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ABSTRACT

This Systems and Exchange Center (SPEC) kit begins with a summary by Virginia Steel of the findings of a survey of Association of Research Libraries (ARL) member libraries that was conducted in 1991 to determine the prevalence of the organizational model of access services--i.e., a department or division responsible for the services and operations that allow physical access to library collections--among academic and research libraries, and to discover how the model has been and continues to be adapted to fit the needs of the larger organization. It is noted that, of the 76 libraries which responded to the survey, about half reported having such a department. Topics covered in the summary include the reporting structure, access/circulation services functions, staffing, budgetary responsibilities, and issues and trends. A copy of the questionnaire with a tally of the responses, a list of the respondents to the survey, and a list of libraries not having an access services department are also provided. The remainder--and largest part--of the kit is made up of materials submitted by survey respondents. These include organization charts from 22 libraries; position descriptions from 13 libraries; and mission and goals statements from six libraries. A list of six selected readings completes the kit. (KRN)

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SYSTEMS AND PROCEDURES EXCHANGE CENTER

Kit 179

Access Services: Organization and Management

November / December 1991

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SPEC

SYSTEMS AND PROCEDURES EXCHANGE CENTER

Flyer 179

Access Services:
Organization and Management

November/December 1991

INTRODUCTION

In the past decade one of the noteworthy organizational trends in U.S. libraries has been the creation of a department or division known as "access services." Responsible for the services and operations that allow physical access to library collections, the specific functions falling under the umbrella of "access services" vary from library to library. The purpose of the SPEC survey on the organization and management of access services was to find out how prevalent this organizational model is among academic and research libraries and to discover how the model has been and continues to be adapted to fit the needs of the larger library organization.

SURVEY RESULTS

Seventy-six libraries responded to the survey, which was conducted in the Spring of 1991. Of these, slightly less than half have a department known as "access services." Almost none of these libraries have had such a department for more than 10 years, demonstrating the relative newness of the access services concept.

Before the emergence of the term "access services," libraries tended to have circulation departments; 20 of the respondents reported that "circulation" continues to be the name of the department that is responsible for physical access to library collections. To make the survey more comprehensive in gathering data about library units responsible for access to materials, the phrase "access/circulation services" was used to include those departments still known by the more traditional term of "circulation."

Reporting Structure. Because access services departments encompass a variety of functions that may be considered part of either technical or public services, a number of variations in reporting structure exist. The most common structure is to have access services reporting to the head of public services. In some cases, however, access/circulation services comes under the purview of technical services, collection development, a branch library, or reports directly to the library director.

"...the specific functions falling under the umbrella of "access services" vary from library to library."

Access/Circulation Services Functions. Not surprizingly, the function that appears to be the core responsibility within access/circulation services is circulation (65 responses). This is closely followed by stacks maintenance (59 responses), course reserves (53 responses), billing (48 responses), and library security (46 responses). Other functions that sometimes fall under this organizational umbrella are storage facilities and services (38 responses), current periodicals and newspapers (33 responses), interlibrary loan (30 responses), photocopy services (25 responses), on-campus document delivery (22 responses), microforms (21 responses), information desk (17 responses), and transportation of materials to and from other libraries (15 responses).

Other functions were also listed, such as maintenance and service of the audiovisual collection, inventory control, bindery and labelling, but these

configurations exist in only one or two institutions.

In several libraries, access/circulation services includes responsibility for operating and providing library-wide support for the automated circulation system as well as other library computer systems. In several other models, access/circulation services is the unit responsible for maintenance of the bibliographic database.

That access/circulation services departments have been evolving within the organization is clearly demonstrated both by the variety of functions that fall within them and by the overwhelming indication that these departments have assumed additional functional responsibilities within the past 5 years. Fifty-two libraries reported that they have taken on new areas, with only 15 reporting that they have not added anything. The most common functions that have been attached to access/circulation services include current periodicals and newspapers (16 responses), library security (12 responses), microforms (11 responses), interlibrary loan (10 responses), on-campus document delivery (9 responses), and photocopy services (8 responses).

With an increased emphasis on access over ownership, the need for a well-prepared manager will be even more critical.

In addition to a trend to add functions to access/circulation services, there is some evidence of a less-common trend to remove functions from such a department. Forty-two libraries did not experience such a change, but in 23 libraries one or more operations were either moved or eliminated. The functions identified were current periodicals and newspapers (5 responses), interlibrary loan (4 responses), photocopy services (3 responses), information desk (2 responses), bindery and labelling (2 responses), and microforms (2 responses).

Even with the number of changes occurring in the libraries that responded to the survey, most (54) of the librarians who completed the survey reported that the division of responsibilities between access/circulation services and other departments in the library works effectively.

Staffing. As would be expected given the number of functions commonly included in access/circulation services departments, these operations employ a large number of people. Most of the employees are either paraprofessionals (21.5 FTE average) or student assistants (27.1 FTE average). There are few professionals (2.3 FTE average) and their focus is on management of operations and services. The average size of an access/circulation services department overall is 49 FTE. If functions continue to be added to access/circulation services, the staff size will continue to grow, and the number of professionals needed to oversee the operations and make policy decisions may increase correspondingly.

Budgetary Responsibilities. While the level of budgetary responsibility for department heads varies from library to library, it is common for access/circulation services managers to control the departmental student wages budget. Less often the department head is also responsible for managing a supplies budget, an equipment budget, and/or a staff personnel budget.

ISSUES AND TRENDS

As access/circulation services departments continue to grow and evolve, the need for a well-prepared manager to run the department will become even more critical. "Access" is being emphasized more than "ownership," and the implications of this are added responsibilities for access/circulation services as well as greater pressure and demands for prompt efficient services. Interlibrary loan, document delivery, and remote storage facilities and services are all functions common to access/circulation services that will require more attention. In order to keep up with these changes, libraries must make careful decisions about the way access functions are organized and staffed and who is responsible for making policy decisions.

This kit and flyer was compiled by Virginia Steel, Head, Access Services Department, University of California, San Diego Library and prepared as part of the OMS Collaborative Research/Writing Program.

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SYSTEMS AND PROCEDURES EXCHANGE CENTER

Kit 179

Access Services:
Organization and Management

November/December 1991

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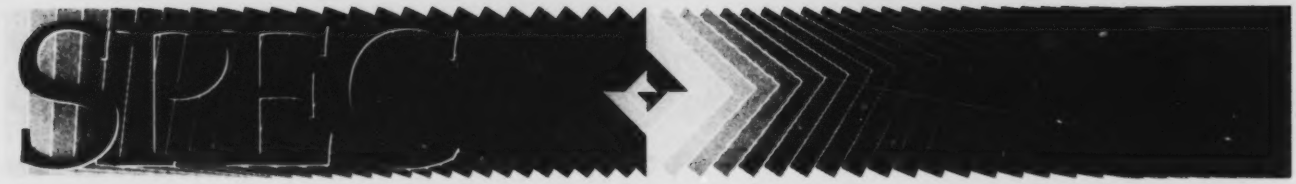


SYSTEMS AND PROCEDURES EXCHANGE CENTER

SURVEY RESULTS

ASSOCIATION OF RESEARCH LIBRARIES
OFFICE OF MANAGEMENT SERVICES
1527 New Hampshire Avenue, N.W., Washington, D.C. 20036
202-232-8656 FAX 202-462-7849

TO: SPEC Liaisons

FROM: C. Brigid Welch, Program Officer for Information Services
Ginny Steel, Brown University

DATE: 16 April 1991

SUBJECT: SPEC Survey and Call for Documents on Access Services: Organization and Management

The purpose of this questionnaire is to find out current trends in the organization of access services and circulation services. This questionnaire should be completed **only** by the person who is head of access/circulation services in the main library, if there is more than one library in the institution. If no such position exists, STOP HERE and return this questionnaire to Brigid Welch at the Office of Management Services, with a note indicating that no such position exists at your library.

If available, please send copies of any documents relating to the following aspects of access/circulation services organization and management:

- Organization charts
- Departmental mission or goals statements
- Job descriptions for the head of access/circulation services
- Policies
- Training materials
- Floor diagrams
- Checklists
- Handouts

Please return this questionnaire and relevant documents by **May 17, 1991**. If you have questions, contact Ginny Steel at Brown University Library, (401) 863-1521; the questionnaire should be returned to Brigid Welch at the ARL Office of Management Services.

SPEC SURVEY - ACCESS SERVICES: ORGANIZATION AND MANAGEMENT

Library/Institution: Compiled Results

Contact Person: _____

Title: _____ Telephone: _____

GENERAL INFORMATION

1. To whom do you report?

33 associate director for public services
0 associate director for budget and planning
2 associate director for collection development
8 library director
4 associate director for technical services
0 associate director for personnel
1 head of branch library
7 other (please specify):

6. Over the past 5 years, have functions been removed from access/circulation services?

23 Yes 42 No

If yes, what functions have been removed?

2 bindery and labelling
0 library security
0 local (on-campus) document delivery
0 transportation of patrons to and from other libraries
5 current periodicals and/or newspapers
2 information desk service
8 other (please specify):
4 interlibrary loan
3 photocopy services
2 microforms
1 transportation of materials to and from other libraries
1 services provided to materials in storage
1 reference desk service

7. Do you think that the division of responsibilities and functions between access/circulation services and other departments in your library works effectively?

54 Yes 8 No

If no, what organizational changes would you recommend? Please use back of sheet if necessary.

8. What changes, if any, do you anticipate in your library's organization in the next decade, and what impact will these changes have on access/circulation services? Please use back of sheet if necessary.

9. What level of budgetary responsibility do you have or resides in your department?

19 manage equipment budget
50 manage student wages budget
8 other (please specify)
24 manage supplies budget
18 manage staff personnel budget

Please mail completed survey and supporting documents by **May 17, 1991** to:

Brigid Welch
Program Officer for Information Services
ARL Office of Management Services
1527 New Hampshire Avenue, NW
Washington, DC 20036

2. If your department is called "access services", for how many years has it had this title?

2 less than 1 year
6 1-2 years
10 2-5 years
9 5-10 years
3 10+ years

What was the title of the department before it became "access services"?

20 circulation
8 other (please specify):

3. What functions fall within the purview of access/circulation services in your library?

65 circulation
48 billing
7 bindery and labelling
46 library security
22 local (on-campus) document delivery
2 transportation of patrons to and from other libraries
33 current periodicals and/or newspapers
17 information desk service
4 preservation
53 reserves
59 stacks maintenance
30 interlibrary loan
25 photocopy services
38 storage facilities and service
15 transportation of materials to and from other libraries
21 microforms
2 reference desk service
88 other (please specify):

4. How many FTE are employed in access/circulation services in your library?

2.3 professionals (including your position)
21.5 paraprofessionals, including clerical staff
27.1 student assistants
other (please specify):
49 TOTAL

5. Over the past 5 years, has the access/circulation services department in your library assumed responsibility for additional functions?

52 Yes
15 No

If yes, what has it assumed?

1 bindery and labelling
12 library security
9 local (on-campus) document delivery
0 transportation of patrons to and from other libraries
16 current periodicals and/or newspapers
5 information desk service
other (please specify):
10 interlibrary loan
8 photocopy services
11 microforms
5 transportation of materials to and from other libraries
5 services provided to materials in storage
0 reference desk service

Libraries Responding to Access Services SPEC Survey

University of Alabama
University of Alberta
Arizona State University
Brigham Young University
University of British Columbia
Brown University
University of California, Davis
University of California, Riverside
University of California, San Diego
University of California, Santa Barbara
Canada Institute for Scientific and Technical Information
Case Western Reserve
Center for Research Libraries
University of Cincinnati
University of Colorado
Colorado State University
University of Connecticut
Cornell University
University of Florida
Georgetown University
Georgia Institute of Technology
Harvard University
University of Houston
University of Illinois-Urbana
University of Iowa
Johns Hopkins University
Kent State University
University of Kentucky
Universite Laval
Linda Hall Library
Louisiana State University
McGill University
McMaster University
University of Manitoba
University of Massachusetts
Massachusetts Institute of Technology
Michigan State University
University of Minnesota
University of Missouri
National Agricultural Library
National Library of Medicine
University of Nebraska
University of New Mexico
New York University
Newberry Library
University of North Carolina
Northwestern University
Notre Dame University
Ohio State University
University of Oklahoma
Oklahoma State University
University of Oregon
Pennsylvania State University
Princeton University
Purdue University
Rice University
University of Rochester
University of Saskatchewan
University of Southern California
Southern Illinois University
Stanford University
State University of New York, Albany
Temple University
University of Tennessee
University of Texas-Austin
Texas A&M University
University of Toronto
Tulane University
University of Utah
Virginia Technological Institute and State University
University of Washington
Washington State University
Washington University, St. Louis
Wayne State University
University of Western Ontario
University of Wisconsin

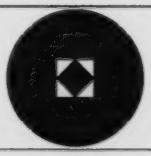
Libraries that Do Not Have an Access/Circulation Services Department

University of Alberta
University of California, Santa Barbara
Georgetown University
Georgia Institute of Technology
Johns Hopkins University
Linda Hall Library
McGill University
Newberry Library
State University of New York, Albany

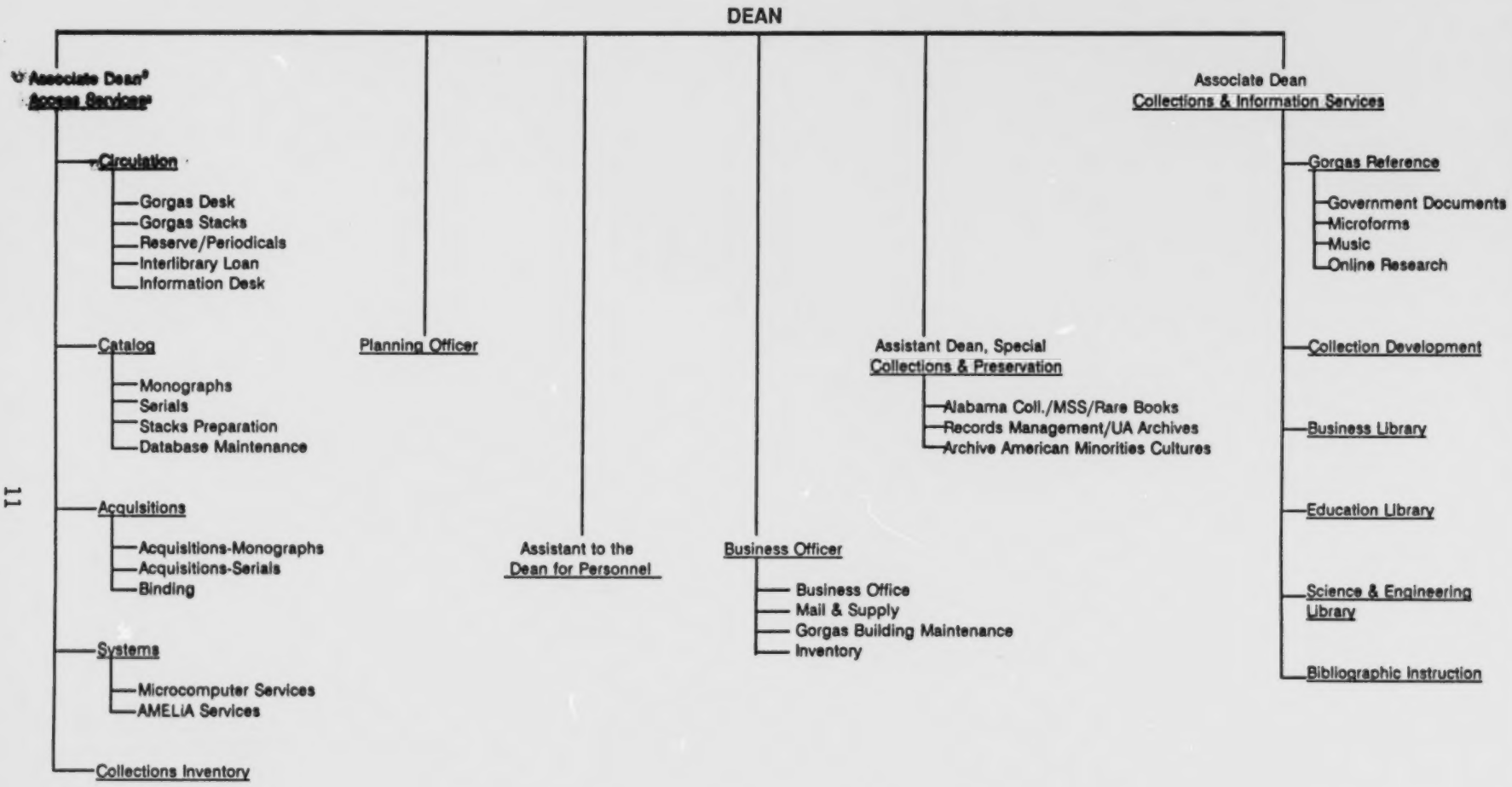
SYSTEMS AND PROCEDURES EXCHANGE CENTER

ORGANIZATION CHARTS

ASSOCIATION OF RESEARCH LIBRARIES



OFFICE OF MANAGEMENT SERVICES



UNIVERSITY OF ALABAMA LIBRARIES
ORGANIZATIONAL CHART

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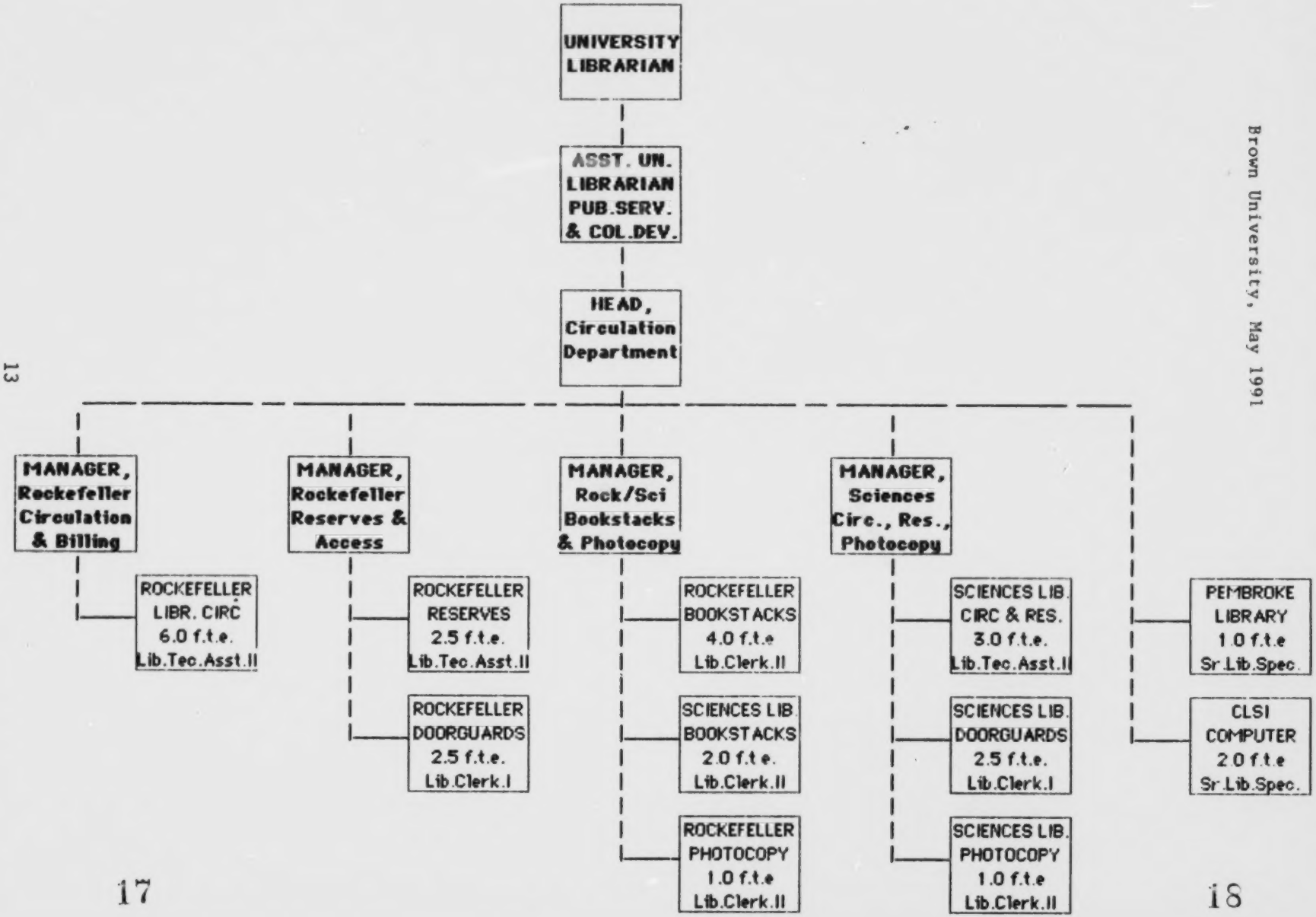
ORGANIZATION OF CIRCULATION DEPARTMENT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ASST. UN. LIBRARIAN PUB.SERV. & COL.DEV.
HEAD, Circulation Department
MANAGER, Rockefeller Circulation & Billing
ROCKEFELLER LIBR. CIRC 6.0 f.t.e. Lib.Tec.Asst.II
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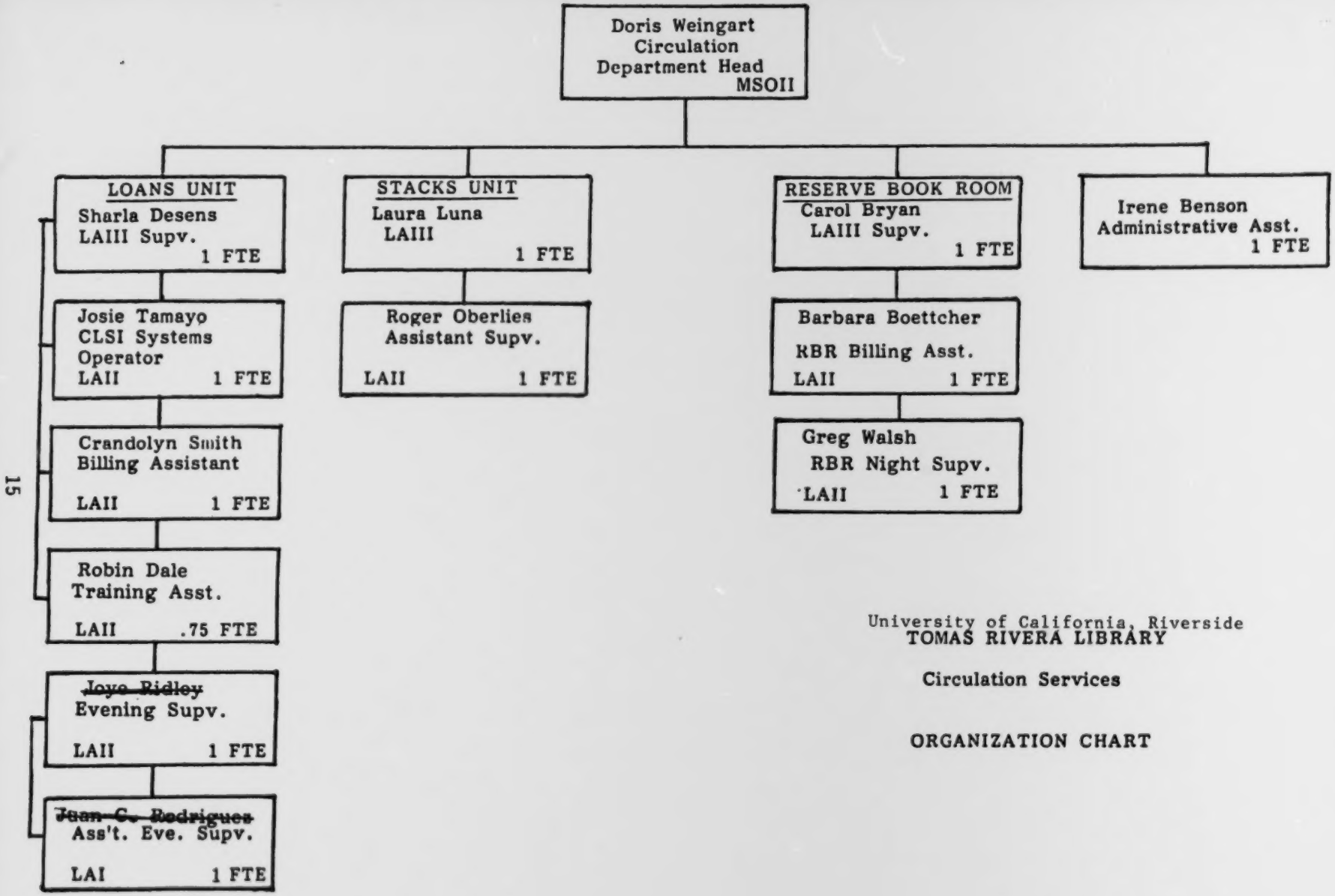
Brown University, May 1991



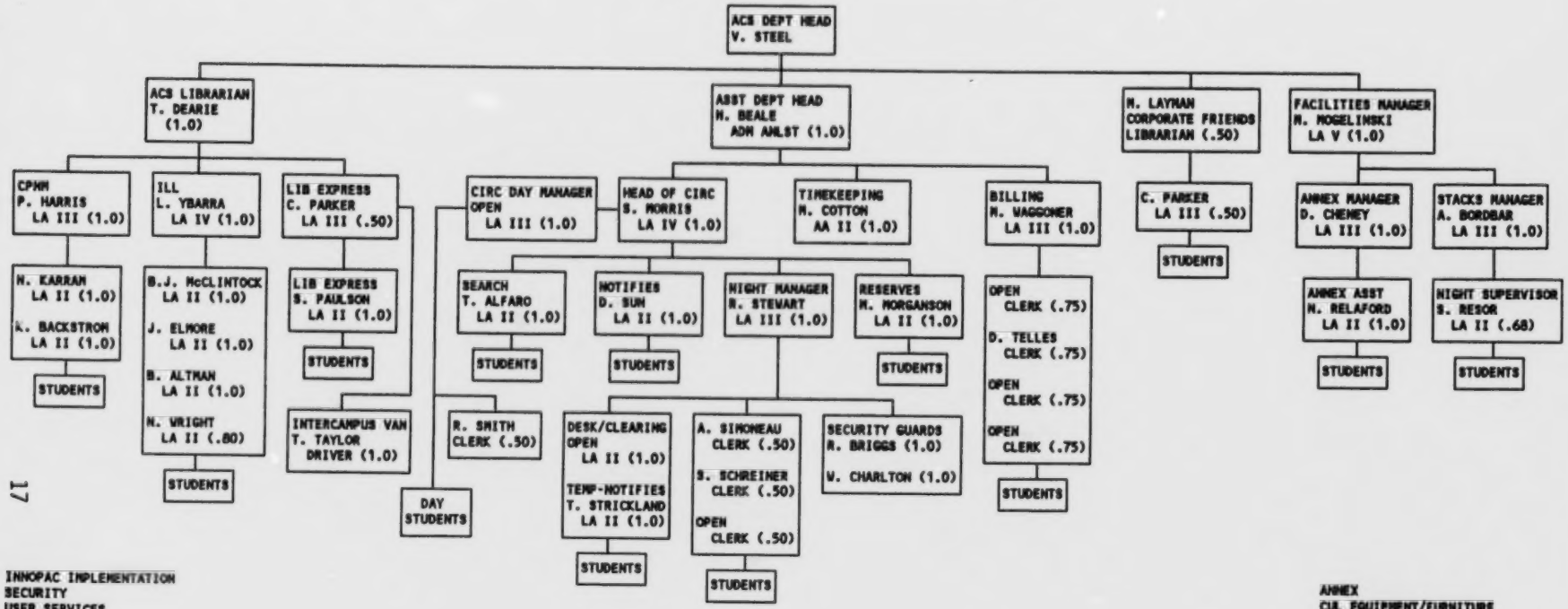
University of California, Riverside
TOMAS RIVERA LIBRARY

Circulation Services

ORGANIZATION CHART

10/90

ACCESS SERVICES ORGANIZATION CHART



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INNOPAC IMPLEMENTATION
SECURITY
USER SERVICES
EQUIPMENT
TRAINING
BUDGETING
PRIVILEGE POLICIES

ANNEX
CUL EQUIPMENT/FURNITURE
CUL ADDITION/PHASING
LIBRARY EXPRESS
SPECIAL PROJECTS
PHYSICAL FACILITIES MANAGEMENT
CUL PHOTOCOPY SERVICES

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The Organization

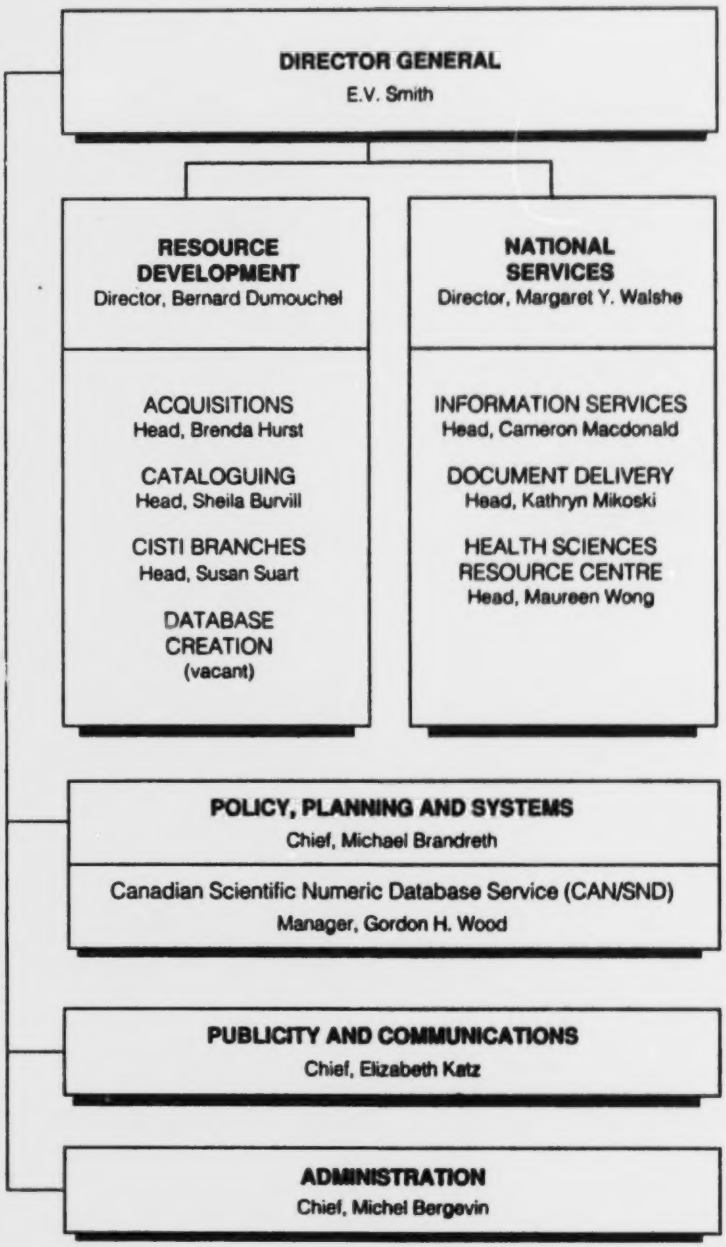
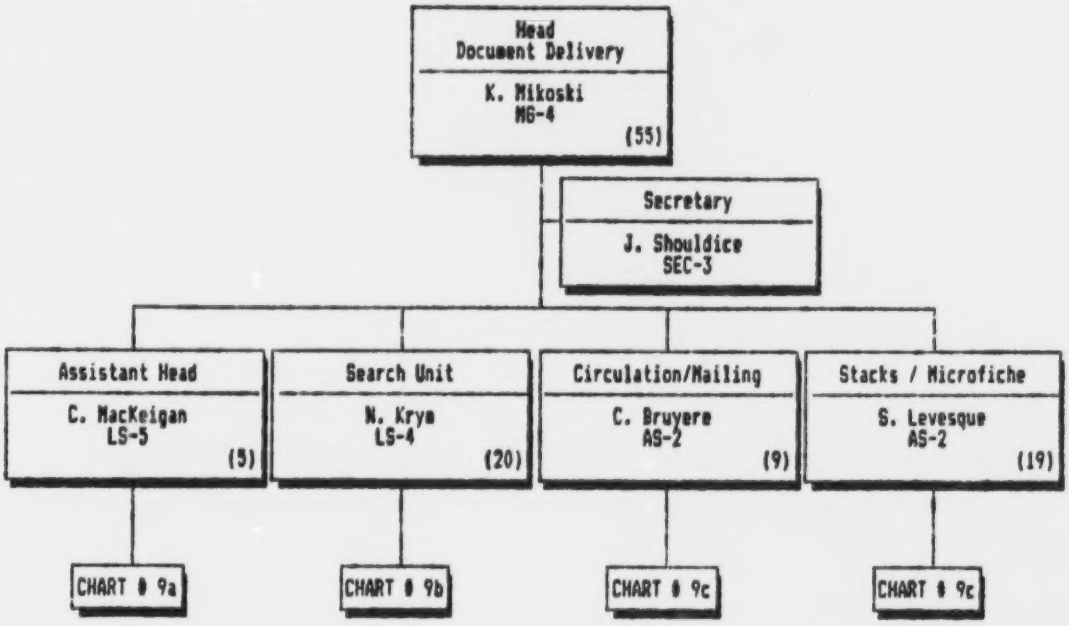


CHART # 9

Document Delivery



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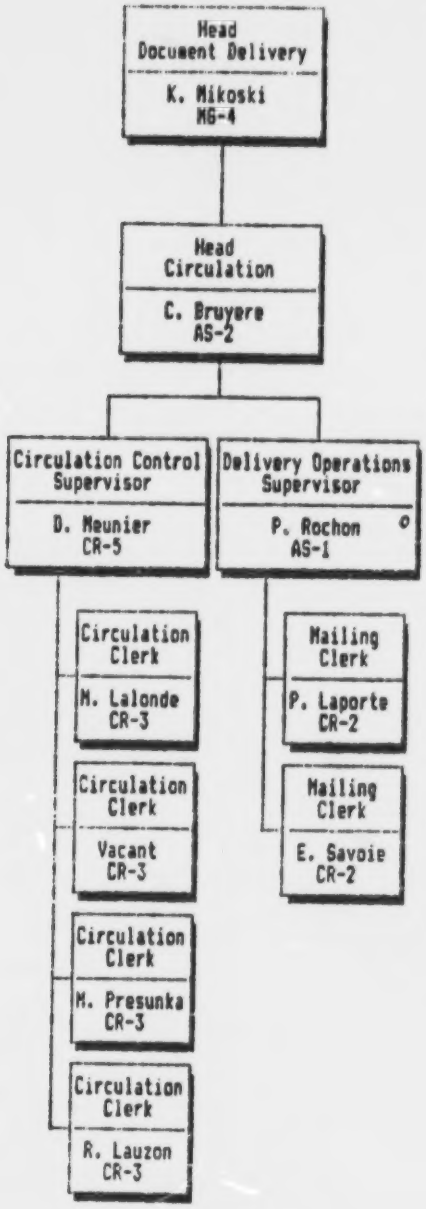
Document Delivery - Circulation



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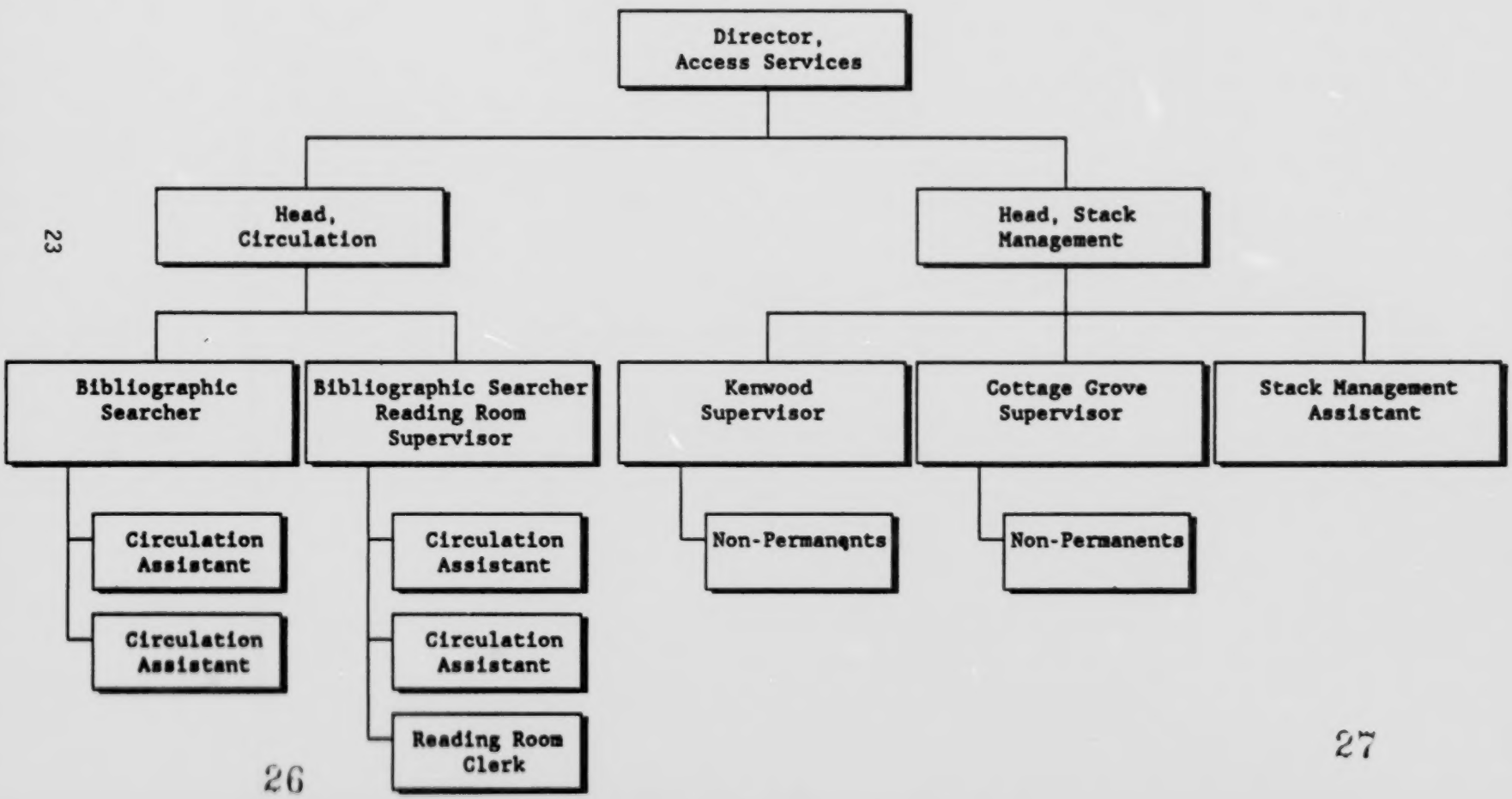
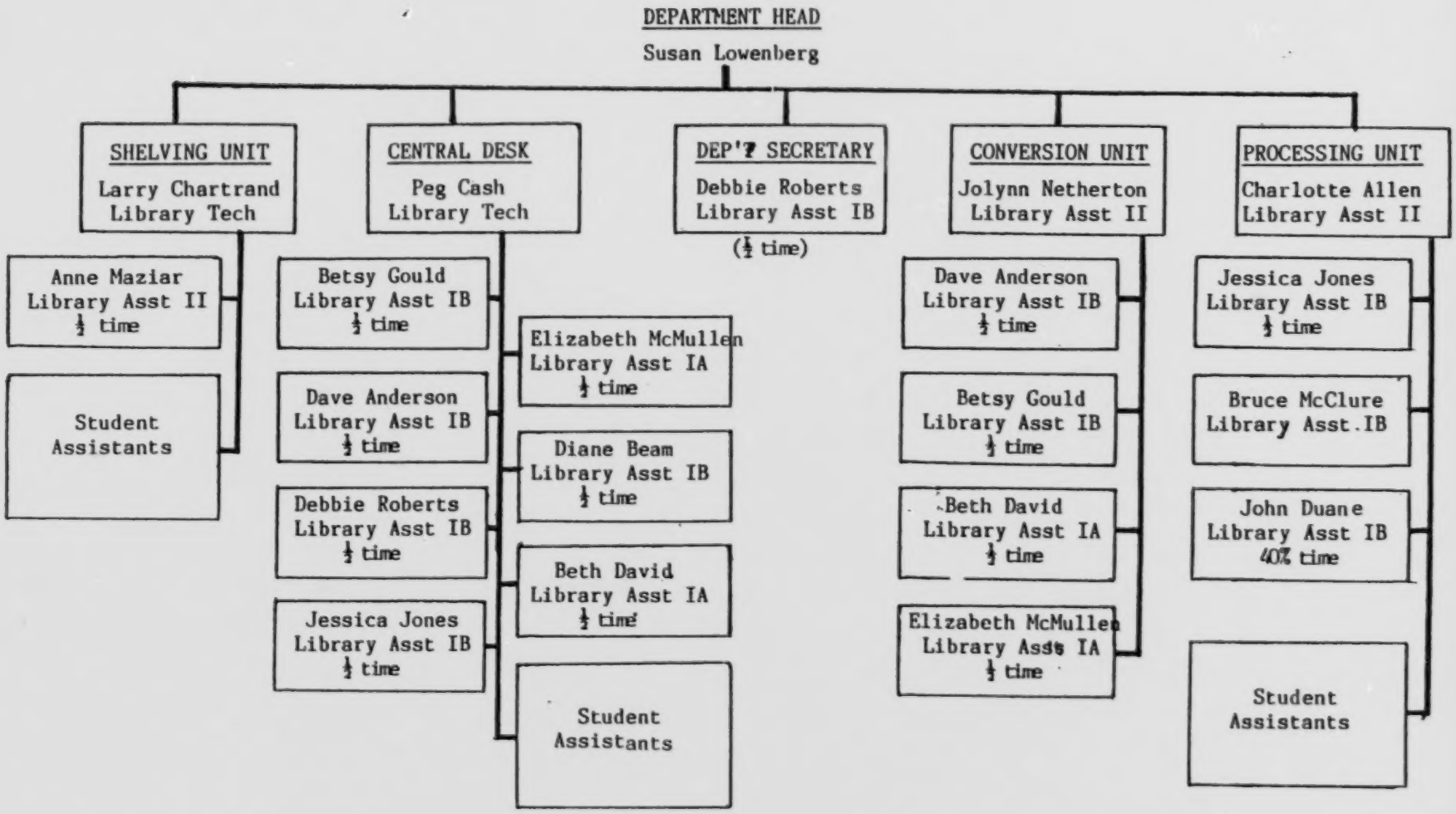
THE CENTER FOR RESEARCH LIBRARIES
Access Services Division
Organizational Chart



University of Colorado
ORGANIZATIONAL CHART
NORLIN ACCESS SERVICES



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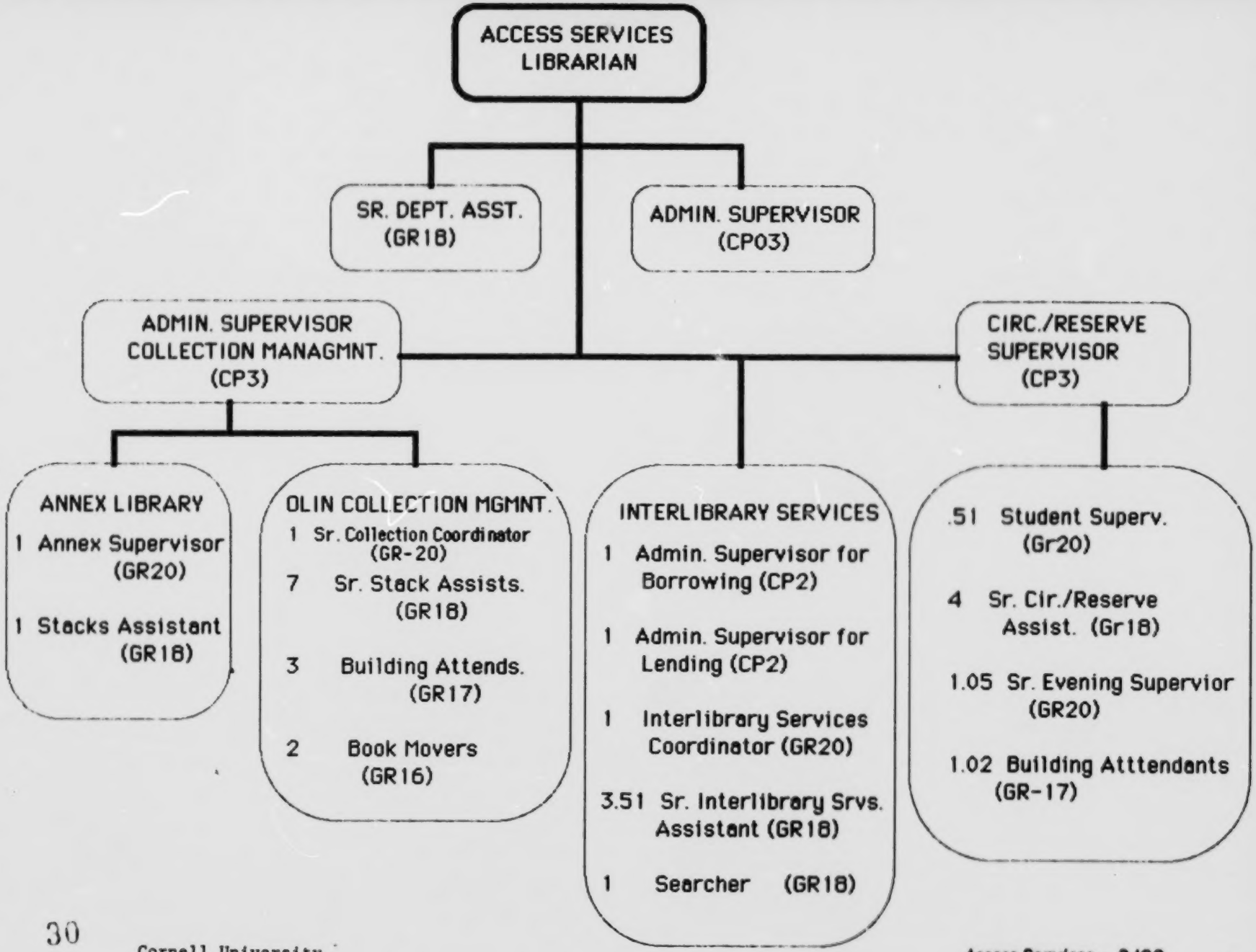
October 1989


ACCESS SERVICES LIBRARIAN
SR. DEPT. ASST. (GR18)
ADMIN. SUPERVISOR (CP03)
ADMIN. SUPERVISOR COLLECTION MANAGMNT. (CP3)
CIRC./RESERVE SUPERVISOR (CP3)
ANNEX LIBRARY
1 Annex Supervisor (GR20)
1 Stacks Assistant (GR18)
OLIN COLLECTION MGMNT.
1 Sr. Collection Coordinator (GR-20)
7 Sr. Stack Assists. (GR18)
3 Building Attends. (GR17)
2 Book Movers (GR16)
INTERLIBRARY SERVICES
1 Admin. Supervisor for Borrowing (CP2)
1 Admin. Supervisor for Lending (CP2)
1 Interlibrary Services Coordinator (GR20)
3.51 Sr. Interlibrary Srvs. Assistant (GR18)
1 Searcher (GR18)
.51 Student Superv. (Gr20)
4 Sr. Cir./Reserve Assist. (Gr18)
1.05 Sr. Evening Supervior (GR20)
1.02 Building Atttendants (GR-17)

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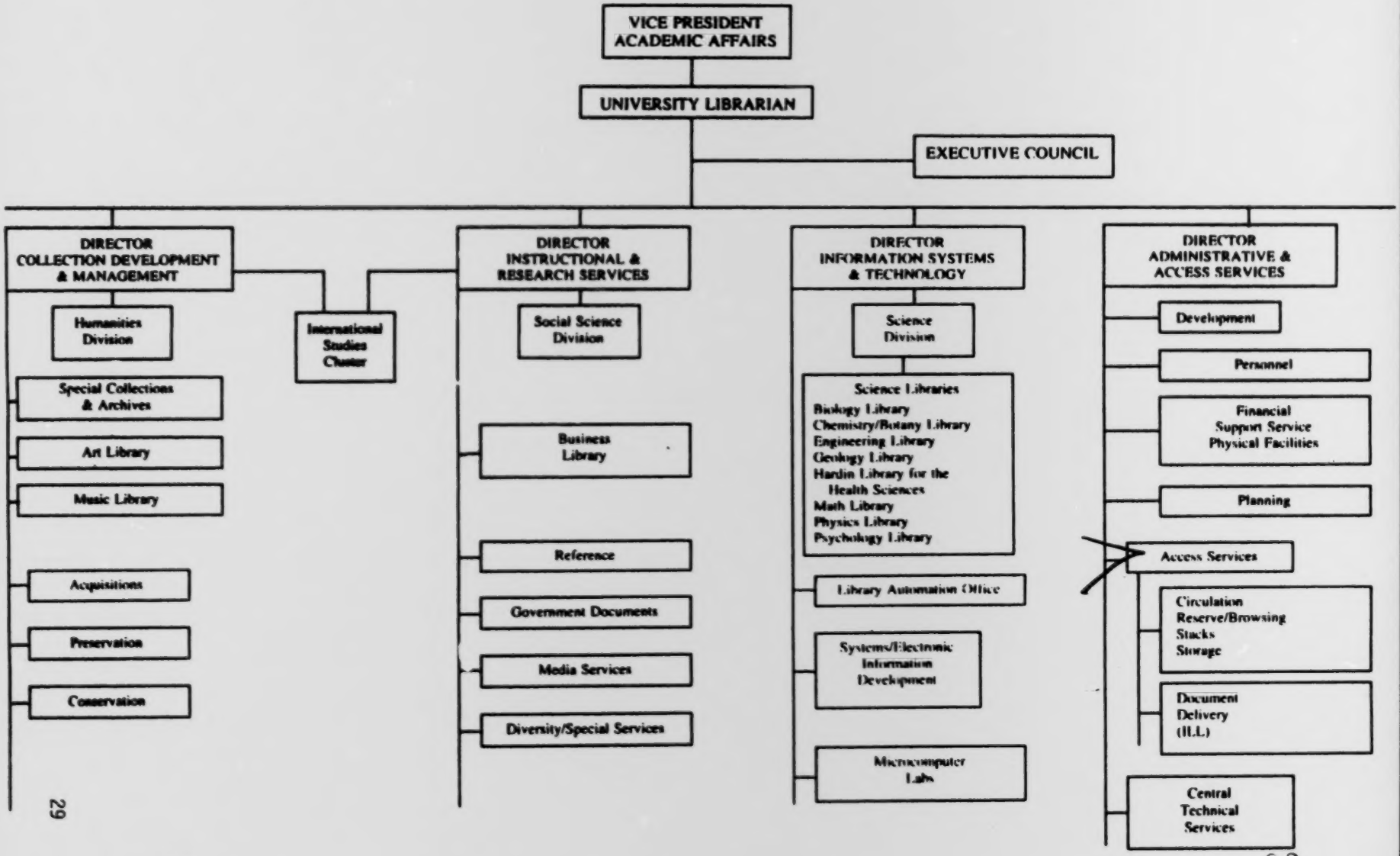

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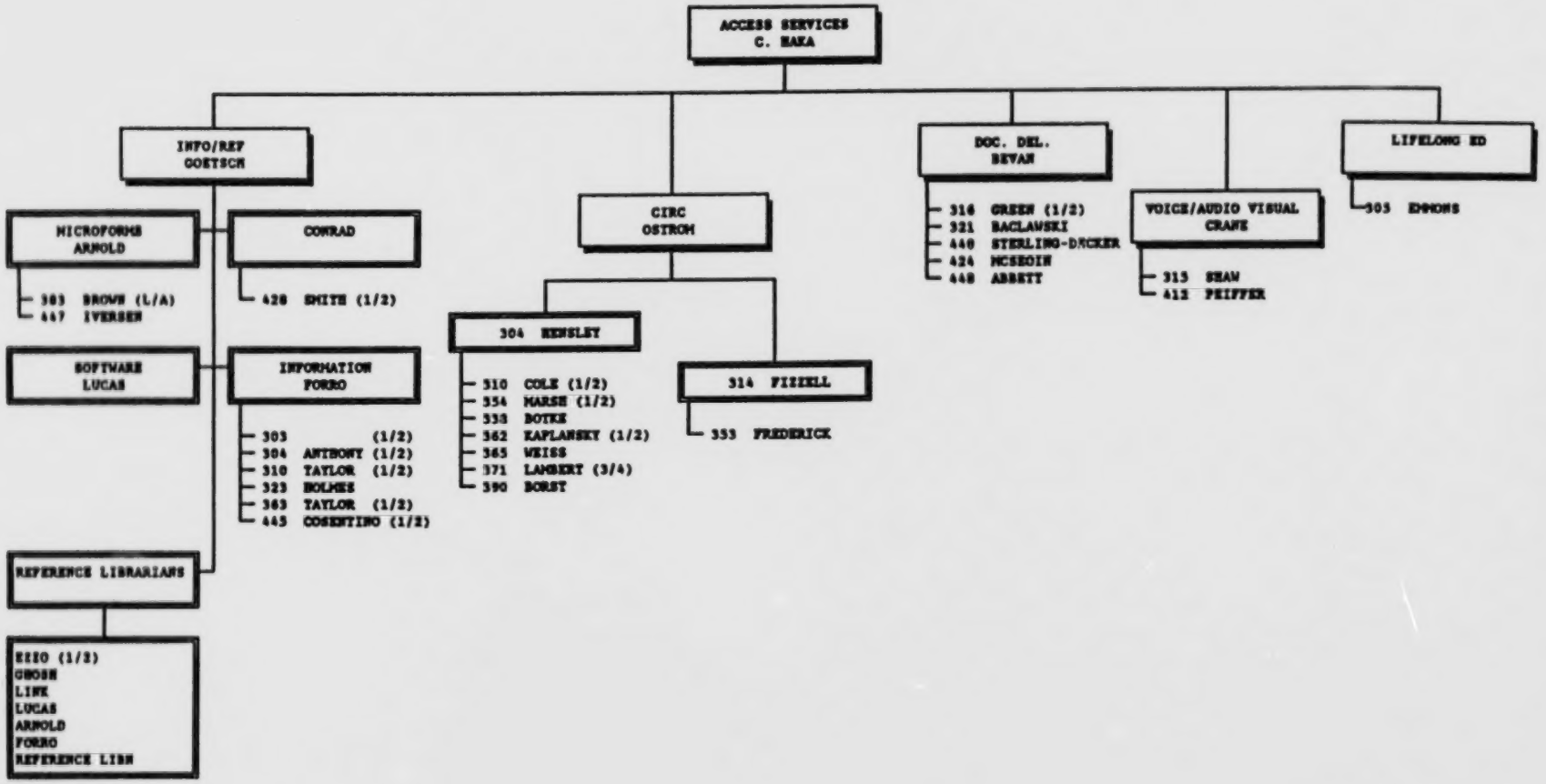
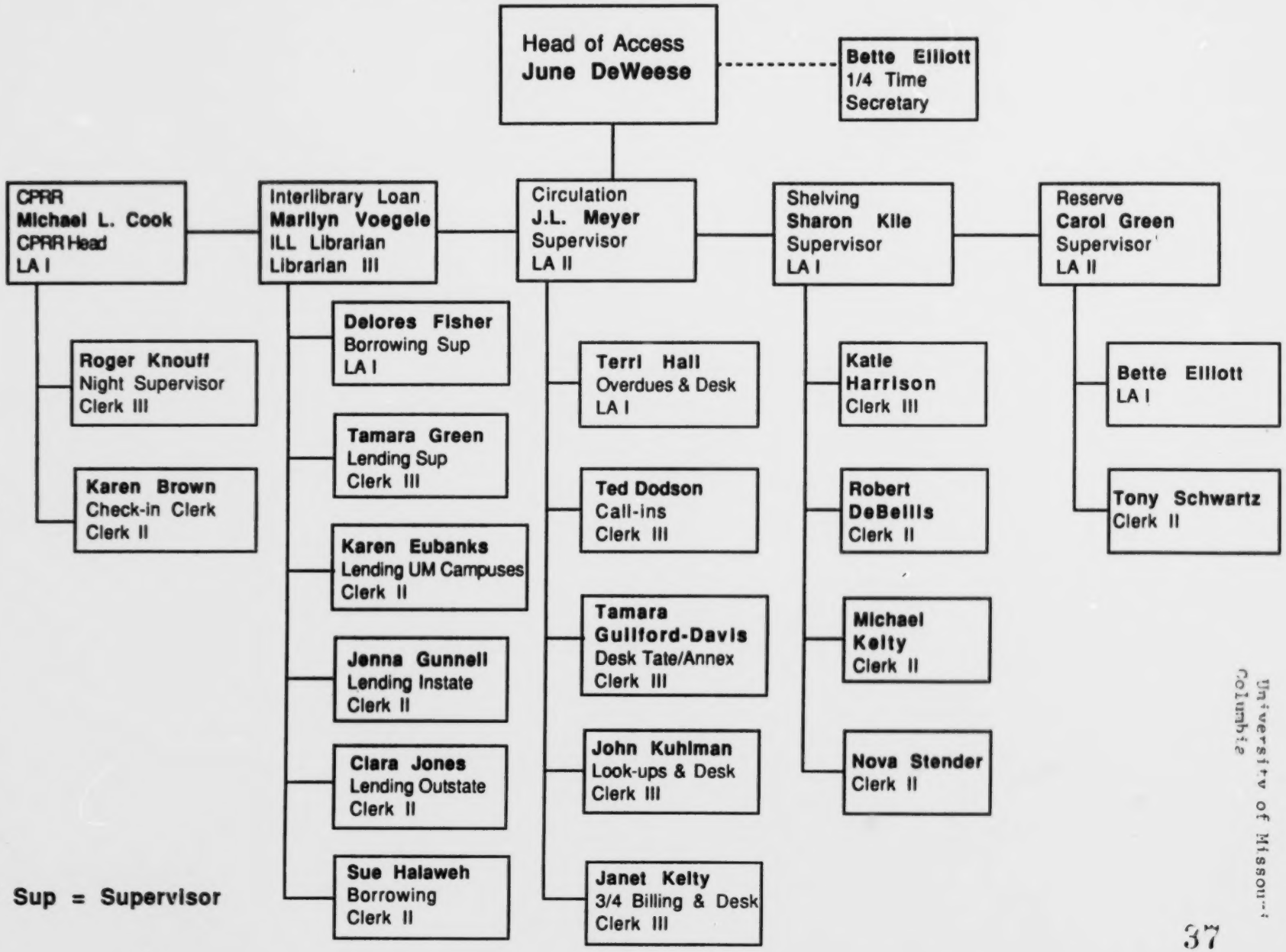


Access Services Division: Organization Chart



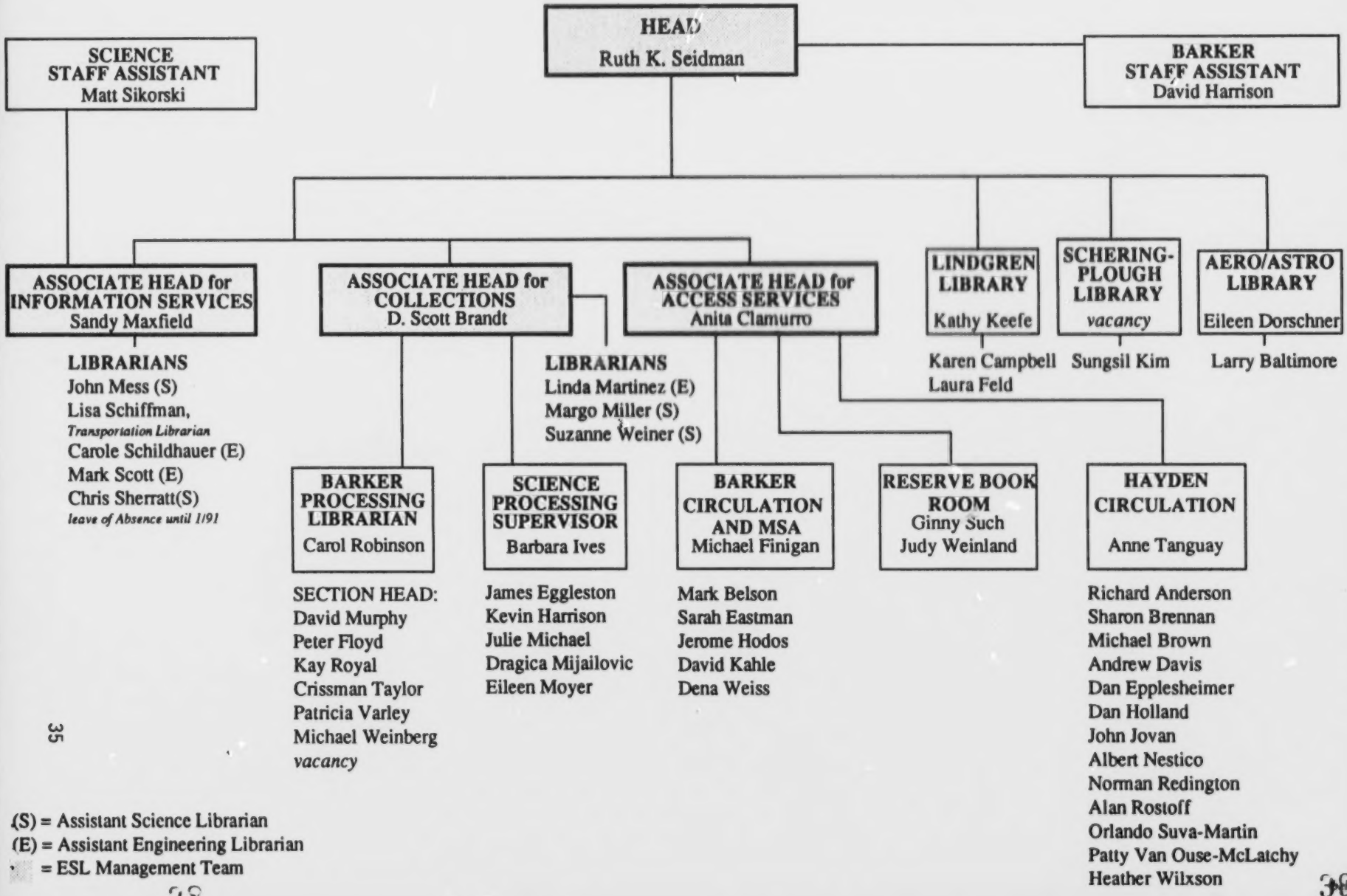
* Sup = Supervisor

University of Missouri-Columbia

MIT -- Engineering and Science Libraries

Reporting Relationships

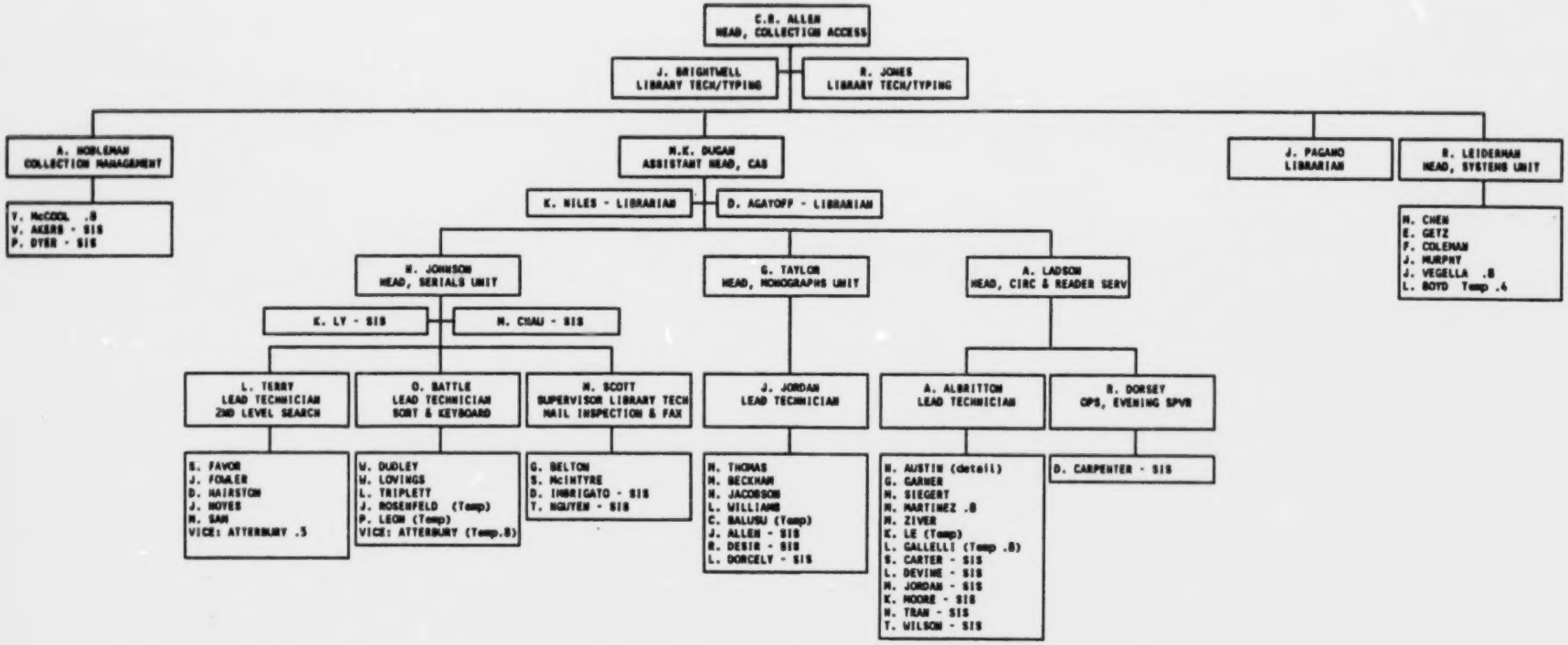
Revised 11/26/90



(S) = Assistant Science Librarian
(E) = Assistant Engineering Librarian
= ESL Management Team

NATIONAL LIBRARY OF MEDICINE
PUBLIC SERVICES DIVISION
COLLECTION ACCESS SECTION

MAY 1991



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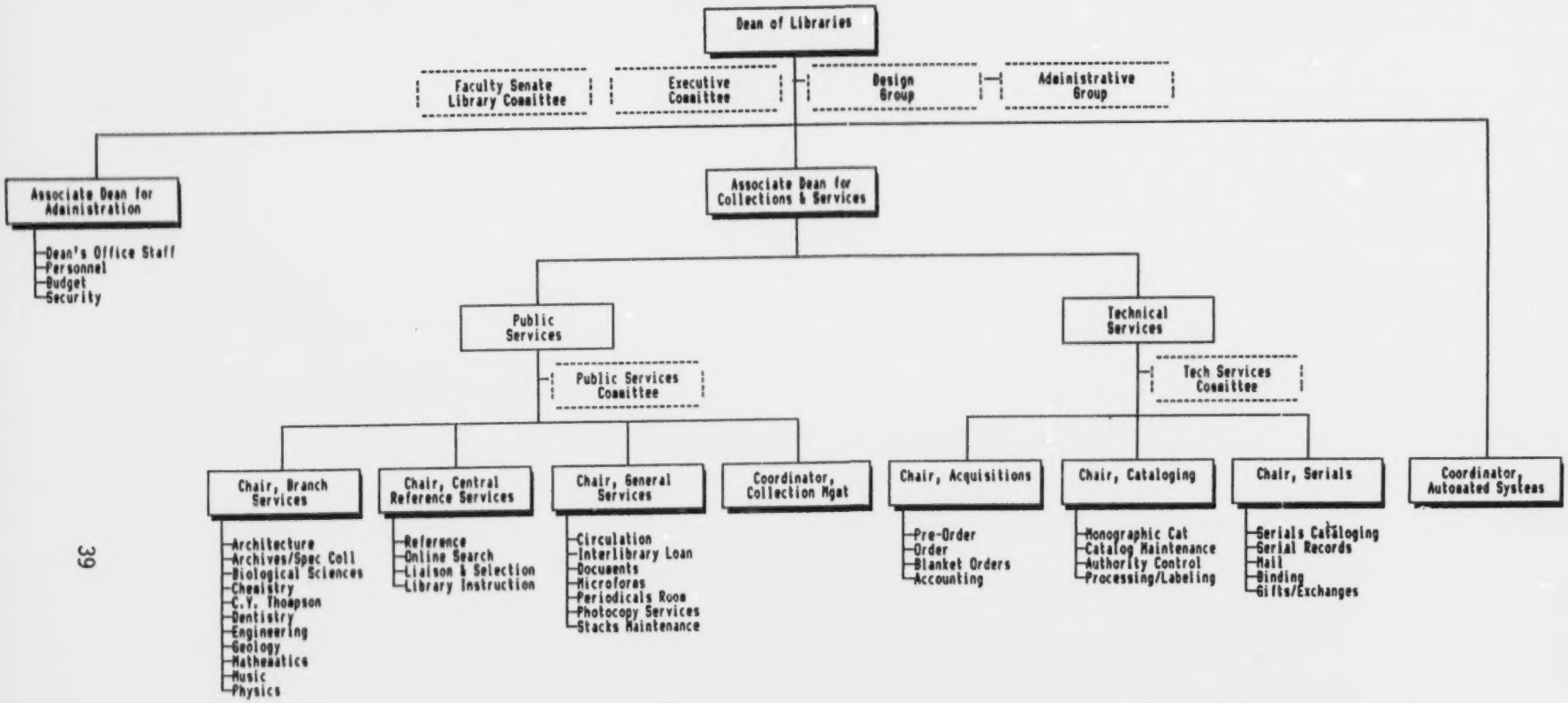
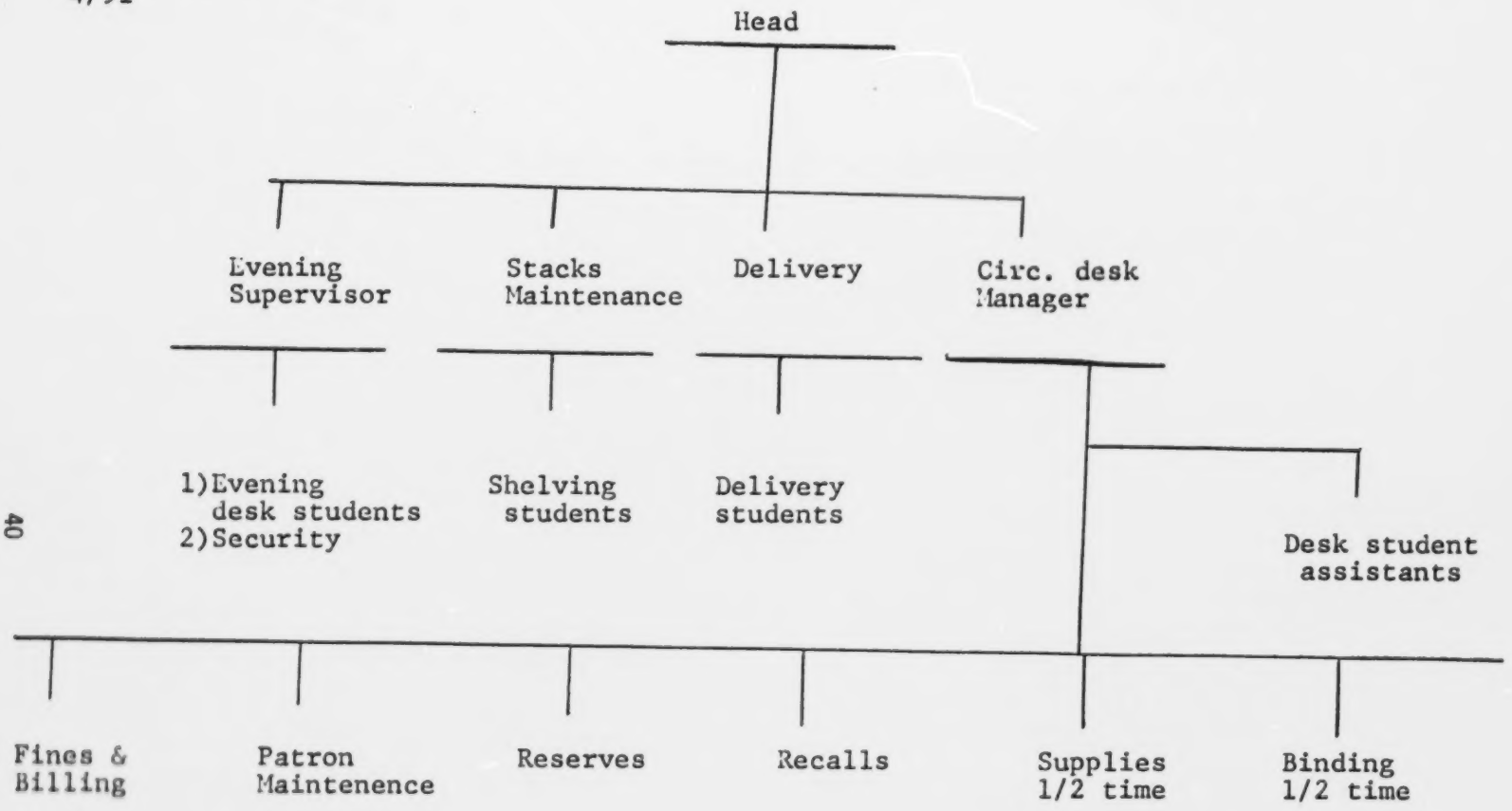

UNIVERSITY LIBRARIES
University of Nebraska-Lincoln
Septeaber 1989
Dean of Libraries
Faculty Senate Library Committee
Executive Committee
Design Group
Administrative Group
Associate Dean for Administration
Dean's Office Staff
Personnel
Budget
Security
Associate Dean for Collections & Services
Public Services
Public Services Committee
Technical Services
Tech Services Committee
Chair, Branch Services
Architecture
Archives/Spec Coll
Biological Sciences
Chemistry
C.Y. Thompson
Dentistry
Engineering
Geology
Mathematics
Music
Physics
Chair, Central Reference Services
Reference
Online Search
Liaison & Selection
Library Instruction
Chair, General Services
Circulation
Interlibrary Loan
Documents
Microforms
Periodicals Room
Photocopy Services
Stacks Maintenance
Coordinator, Collection Mgmt
Chair, Acquisitions
Pre-Order
Order
Blanket Orders
Accounting
Chair, Cataloging
Monographic Cat
Catalog Maintenance
Authority Control
Processing/Labeling
Chair, Serials
Serials Cataloging
Serial Records
Mail
Binding
Gifts/Exchanges
Coordinator, Automated Systems

Circulation Services
4/91



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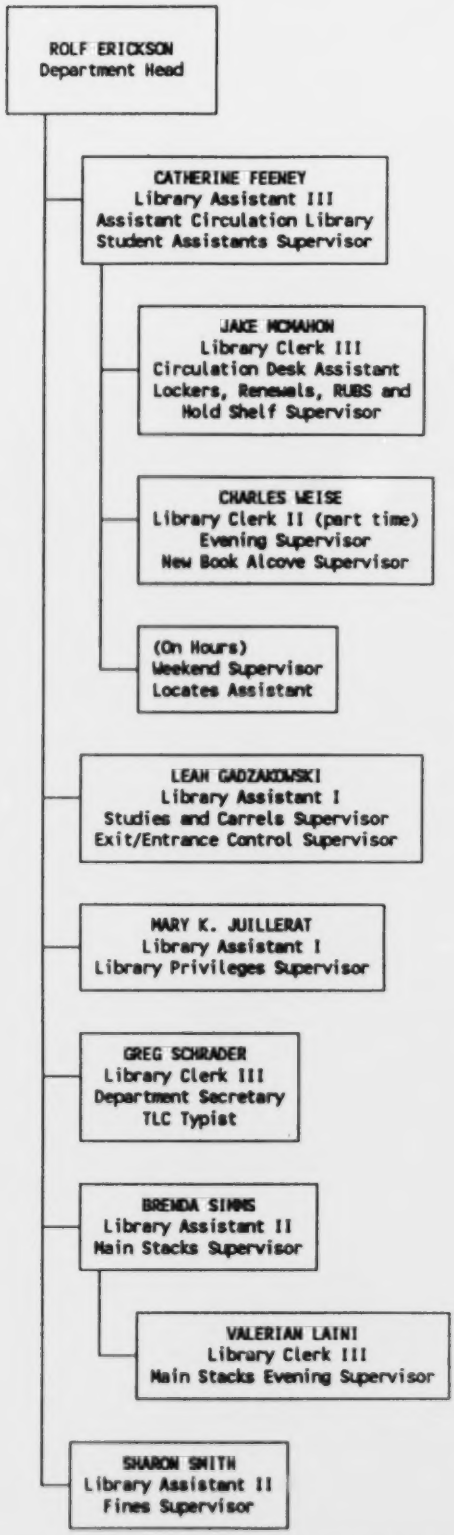
CIRCULATION SERVICES DEPARTMENT
Organization Chart

Northwestern University



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March 19, 1991

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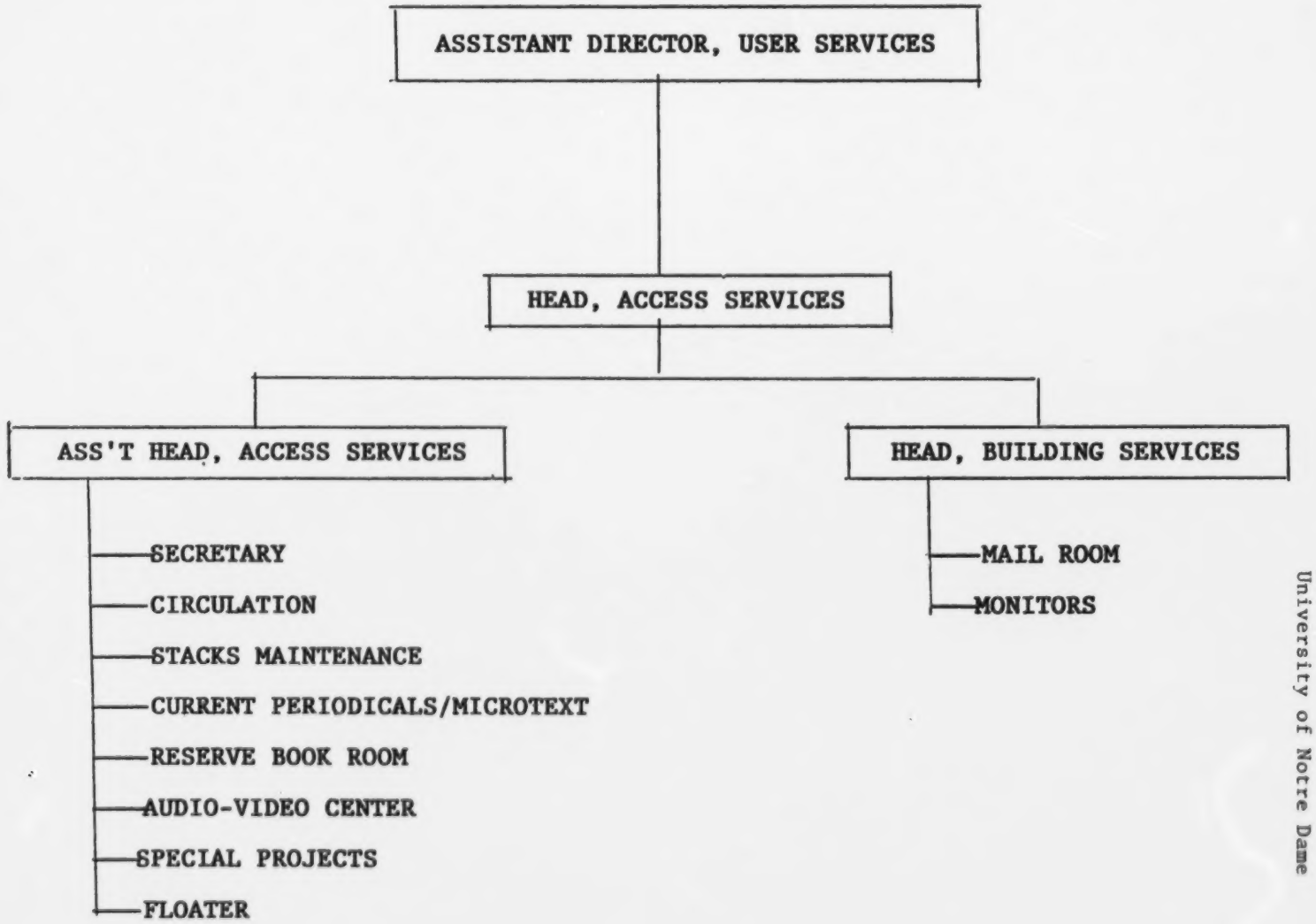
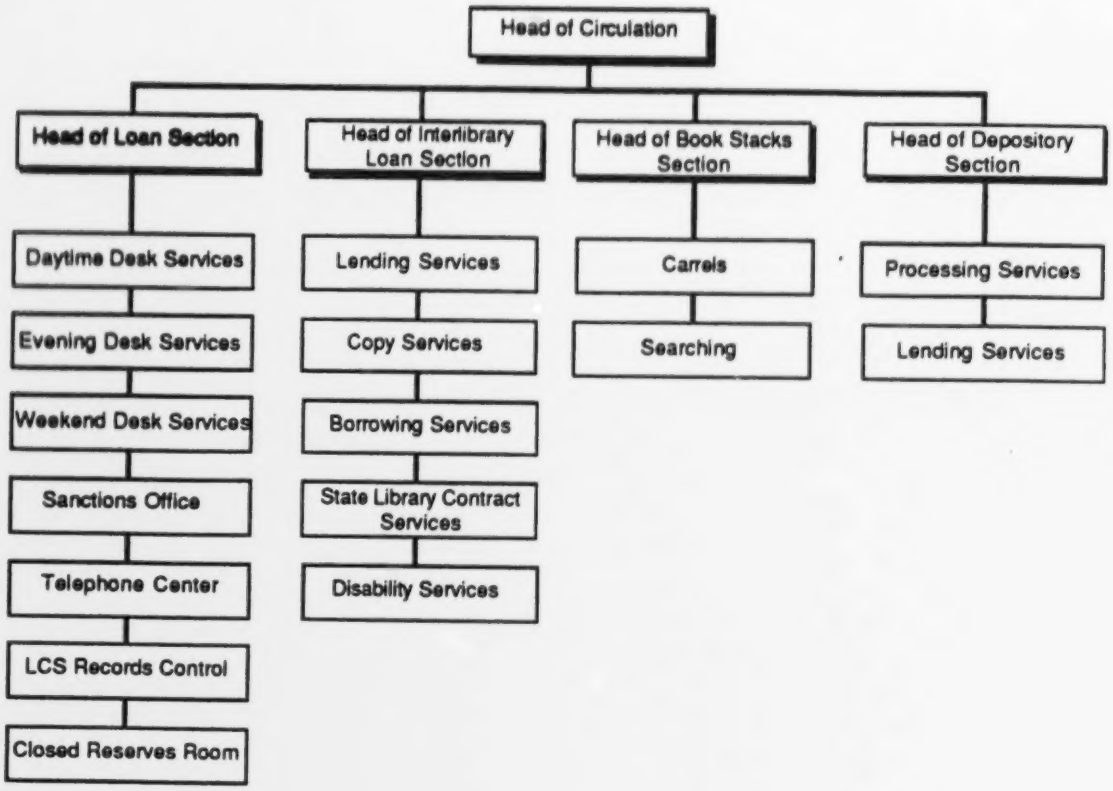
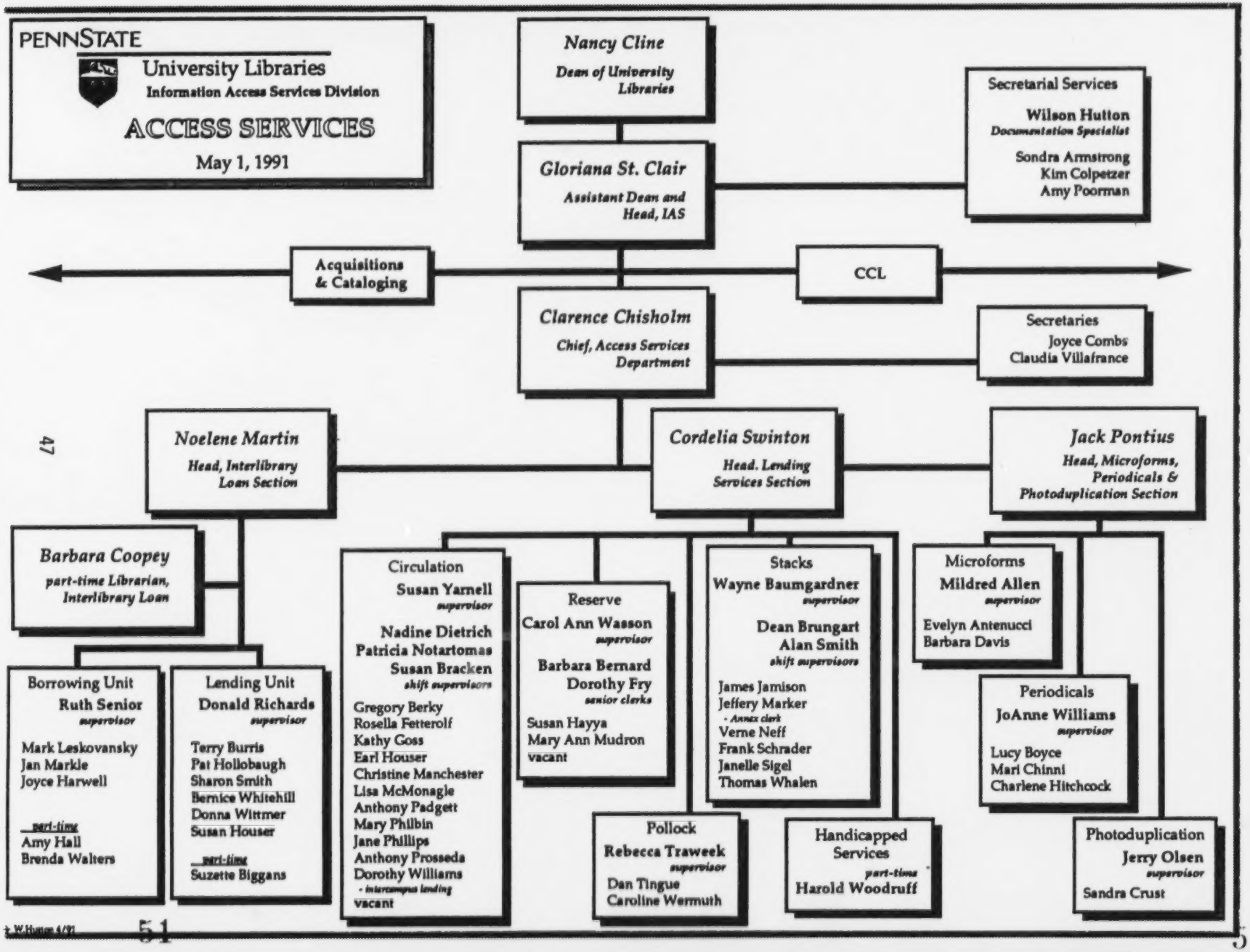


University of Notre Dame

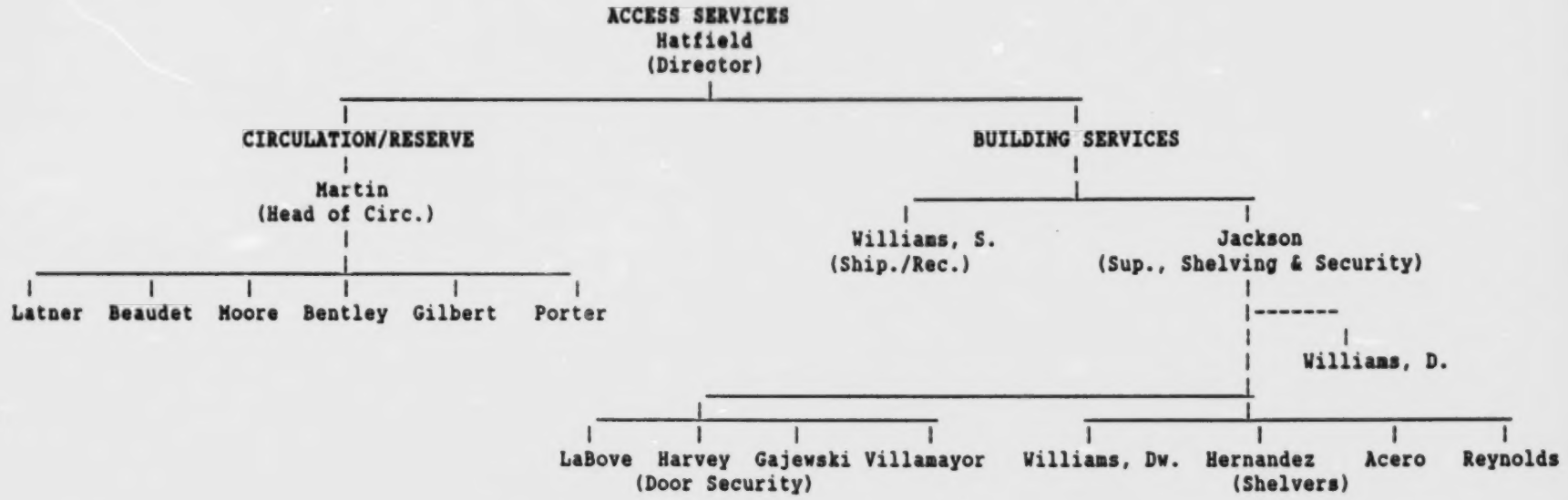
The Ohio State University
LIBRARIES
Circulation Department



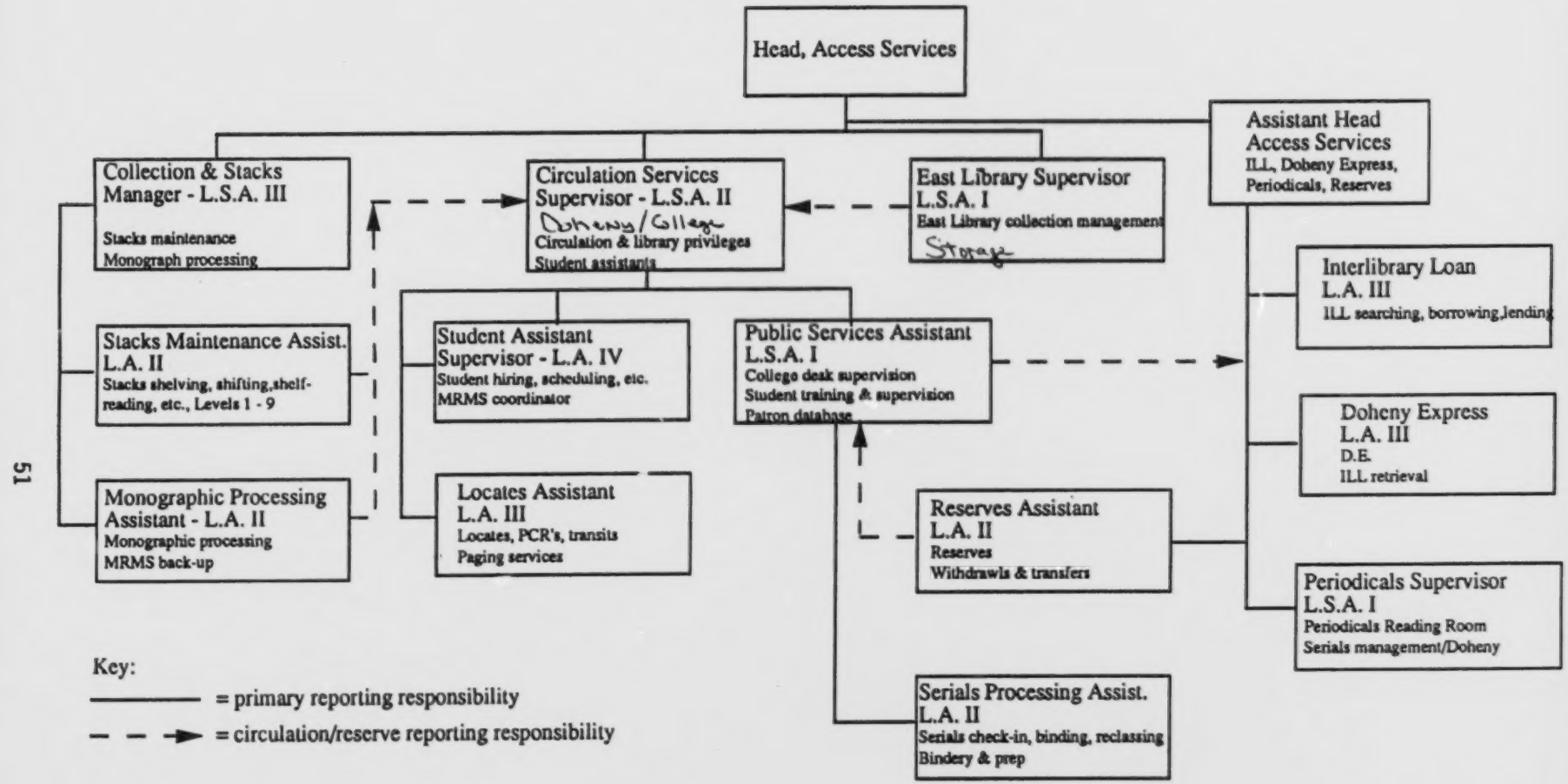
December 1988


PENNSTATE
University Libraries
Information Access Services Division
ACCESS SERVICES
May 1, 1991
Nancy Cline
Dean of University Libraries
Gloriana St. Clair
Assistant Dean and Head, IAS
Secretarial Services
Wilson Hutton
Documentation Specialist
Sondra Armstrong
Kim Colpetzer
Amy Poorman
Acquisitions & Cataloging
CCL
Clarence Chisholm
Chief, Access Services Department
Secretaries
Joyce Combs
Claudia Villafrance
Noelene Martin
Head, Interlibrary Loan Section
Cordelia Swinton
Head, Lending Services Section
Jack Pontius
Head, Microforms, Periodicals & Photoduplication Section
Barbara Coopey
part-time Librarian, Interlibrary Loan
Borrowing Unit
Ruth Senior
supervisor
Mark Leskovansky
Jan Markle
Joyce Harwell
part-time
Amy Hall
Brenda Walters
Lending Unit
Donald Richards
supervisor
Terry Burris
Pat Hollobaugh
Sharon Smith
Bernice Whitehill
Donna Wittmer
Susan Houser
part-time
Suzette Biggans
Circulation
Susan Yarnell
supervisor
Nadine Dietrich
Patricia Notartomas
Susan Bracken
shift supervisors
Gregory Berky
Rosella Fetterolf
Kathy Goss
Earl Houser
Christine Manchester
Lisa McMonagle
Anthony Padgett
Mary Philbin
Jane Phillips
Anthony Prosseda
Dorothy Williams
- intercampus lending
vacant
Reserve
Carol Ann Wasson
supervisor
Barbara Bernard
Dorothy Fry
senior clerks
Susan Hayya
Mary Ann Mudron
vacant
Stacks
Wayne Baumgardner
supervisor
Dean Brungart
Alan Smith
shift supervisors
James Jamison
Jeffery Marker
- Annex clerk
Verne Neff
Frank Schrader
Janelle Sigel
Thomas Whalen
Pollock
Rebecca Traweek
supervisor
Dan Tingue
Caroline Wermuth
Handicapped Services
part-time
Harold Woodruff
Microforms
Mildred Allen
supervisor
Evelyn Antenucci
Barbara Davis
Periodicals
JoAnne Williams
supervisor
Lucy Boyce
Mari Chinni
Charlene Hitchcock
Photoduplication
Jerry Olsen
supervisor
Sandra Crust

Rice University

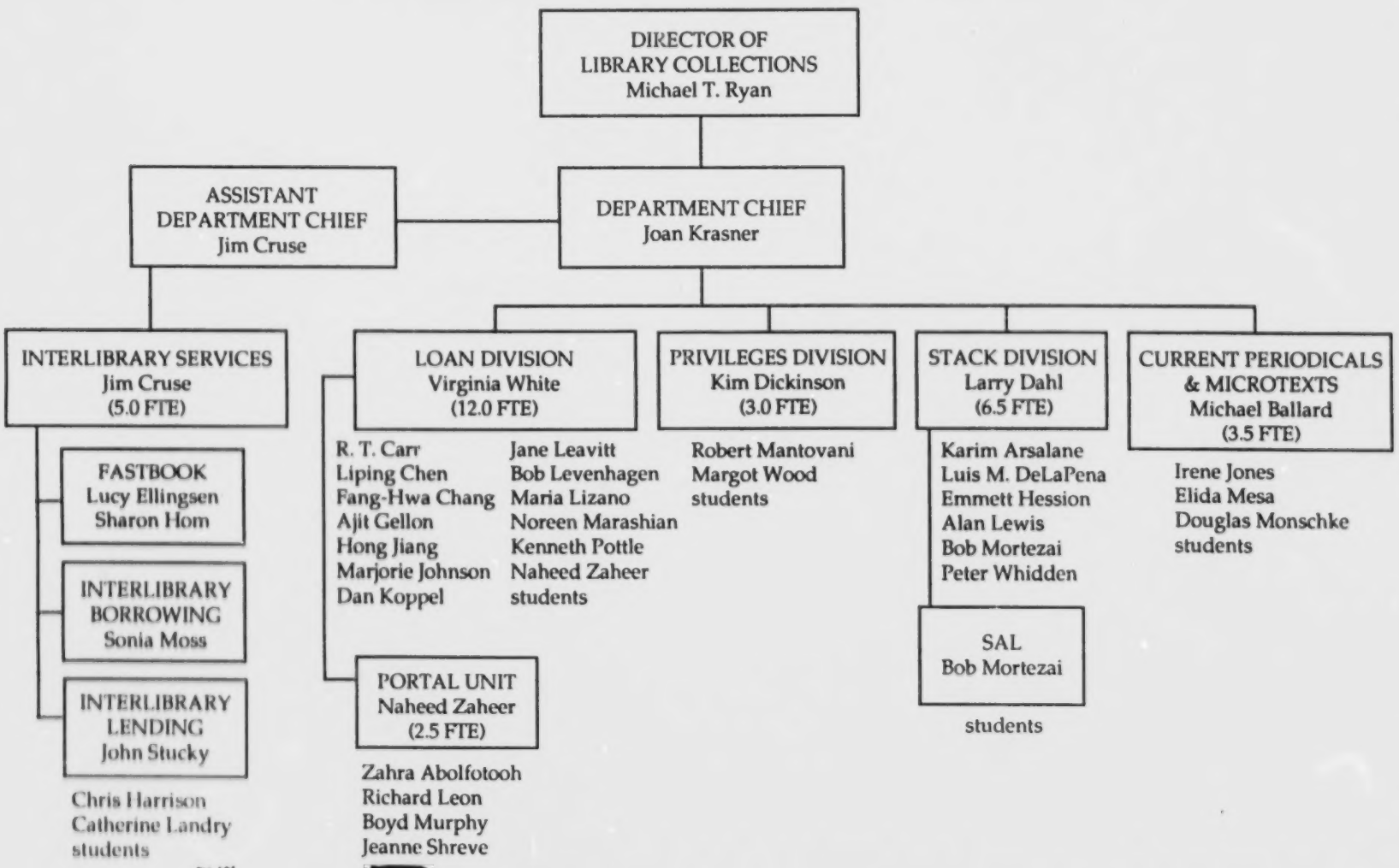


Access Services Organizational Chart



7/27/90

Stanford University Libraries
ACCESS SERVICES DEPARTMENT



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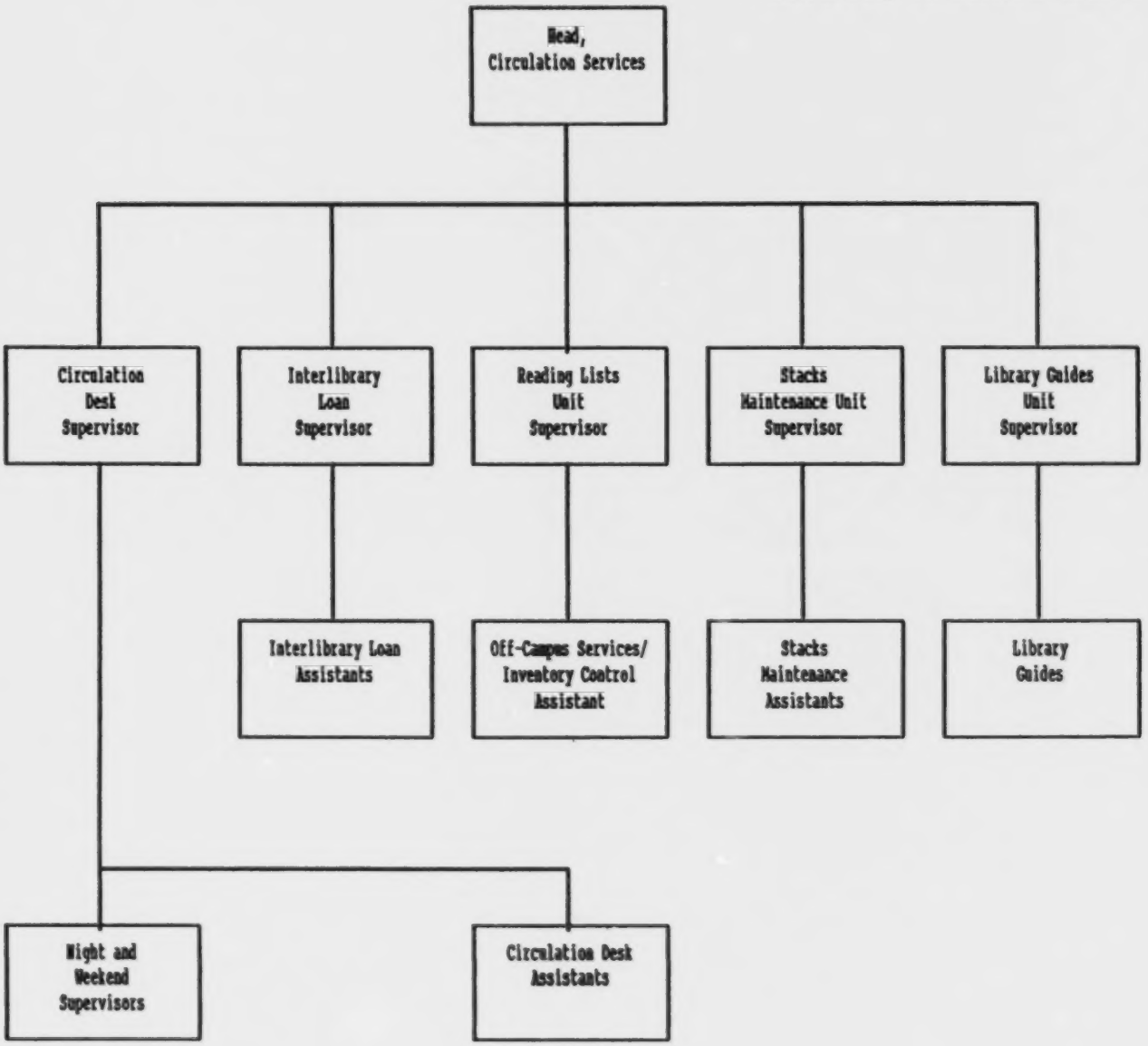
Tonya Marie Parrish

58

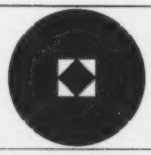
February 1991



Circulation Services, The D. B. Weldon Library
Organization Chart (Rev. 91.05.09)

SYSTEMS AND PROCEDURES EXCHANGE CENTER

POSITION DESCRIPTIONS

ASSOCIATION OF RESEARCH LIBRARIES  OFFICE OF MANAGEMENT SERVICES

UNIVERSITY OF CALIFORNIA RIVERSIDE

JOB DESCRIPTION

U1607 (R 2/77) Series 833

PERSONNEL USE ONLY

APPROVED TITLE	EFFECTIVE DATE	TITLE CODE	INITIALS	DATE
MSO II	11/1/89	7511	JSM	

1 NAME: Doris M. Weingart	
2 DEPARTMENT: Library	3 CAMPUS: Riverside
4 PRESENT PAYROLL TITLE	5 STEP
6 WORKING TITLE IF DIFFERENT: Head of Circulation Services and Building Manager	7 PERCENT OF TIME: 100
8 SUPERVISOR'S NAME	9 SUPERVISOR'S PAYROLL TITLE
10 DEPARTMENT HEAD'S NAME IF DIFFERENT	11 DEPARTMENT HEAD'S TITLE

12 NAMES OF THOSE SUPERVISED	13 PAYROLL TITLE	PERCENT OF TIME
[illegible]	AA =	1.00
[illegible]	LA II - Supervisor	1.00
[illegible]	LA III - Supervisor	1.00
[illegible]	LA II	1.00

14 STATEMENT OF DUTIES: Describe your regular and most important duties first. Estimate the amount of your working time spent on each major duty, using percentages, number of hours per day, or a similar breakdown. Use reverse side.

PERCENT OF TIME	DUTIES
	This position has two major areas of responsibility: 1) serves as Head of the Circulation Services Department in the Rivera Library, under the general direction of the Head of the Public Services Division, and 2) serves as the Library's Building Manager under the general direction of the Associate University Librarian. The Head of the Public Services Division is the primary supervisor and review initiator for the position, with appropriate consultation with the Assbciate University Librarian. The incumbent serves as a member of the Department Heads Group and provides advice and information regarding policy, planning, budget, and operational matters related to circulation services and the library's facilities.
60%	**HEAD OF CIRCULATION SERVICES DEPARTMENT** Responsible for the management of the Circulation Services Department, including the hiring, training and review of staff, the operation of the CLSI circulation system, the development and implementation of programs which promote the service mission of the library, the handling of public relations related to the functions of the Department, and the maintenance of an atmosphere conducive to good service. Translate library policy into operational procedures, update and interpret loan policies, oversee the issuance of library cards in accordance with library policy, and coordinate campus and off-campus use of the collection. Coordinate staff and schedules of separate sections, conferring regularly with staff individually and as a group, to review procedures and activities and to explore and assess new programs and developments. Prepare annual budget and statements of projected requirements for staff, equipment, and facilities. Prepare reports regarding the activities of the Department, analyzing developments, making recommendations, and defining goals.

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(Use reverse side if more room is necessary.)

PERCENT OF TIME.	DUTIES
	Directly responsible for the operation and maintenance of the CLSI hardware and software, and the development and control of policies and procedures concerning the automated circulation system, particularly the operation of the CLSI console. Participate in campus, systemwide, local and regional circulation programs. Serve as Chair of the CLSI/Circulation Advisory Committee and participate on other task forces/committees as appointed. Serve as liaison with other UC campuses and academic institutions on circulation matters.
40%	**BUILDING MANAGER** Serves as the Library's Building Manager with responsibility for the library's facilities, the security and safety of facilities and personnel, and emergency planning and the handling of emergencies. Keeps library department heads informed regarding matters relating to the maintenance of the facilities, security and safety, and emergency preparation. Serves as the Library's representative to, and maintains close working relationships with other University departments as required. <u>Facilities</u> Responsible for the physical facilities of the Rivera, Bio-Agricultural, Physical Sciences, and Music Libraries, working with appropriate Library Division Heads and Library Administration. Serves as the Library's representative to the departments of the Vice Chancellor--Administration in assuring that the library's facilities are properly maintained and provide a safe and secure environment for study and research. Works with Library staff to evaluate the use of space for specific library functions, and develops alternative layouts and arrangements to best utilize the space for the function. Conducts research to identify the furniture, shelving, and equipment required to best serve library operations and services with the available space. Coordinates the installation of equipment, identifies structural and/or wiring changes necessary for the operation of the equipment, and follows through to implement such changes. Plans and undertakes studies as required, such as an analysis of the use of telephone equipment, a review of furniture needs, an analysis of the use of space, etc. <u>Safety and Security</u> Has overall responsibility regarding the safety and security of the Library system. This responsibility includes the safety of the staff and Library patrons as well as the safety and security of the library's facilities, records, and equipment. Works with the Library Preservation Officer to ensure the security of the collections. Works with the Health and Safety Office and the Police Department in addressing Library safety and security problems. ***(If additional space is needed, use blank sheets and attach to this form.)***

15 HOW LONG HAVE YOUR DUTIES AND THE DISTRIBUTION OF TIME BEEN SUBSTANTIALLY AS ABOVE?

16 CERTIFICATE OF EMPLOYEE: I certify that the foregoing information is correct and complete and describes my job as I understand it.

Chris Wiley — SIGNATURE — 5-25-90 — DATE

17 CERTIFICATE OF IMMEDIATE SUPERVISOR AND DEPARTMENT HEAD: I have reviewed the above statements and certify to their accuracy with the exceptions noted here.

Nancy Hulings — SUPERVISOR'S SIGNATURE — 5-29-90 — DATE

62

DEPARTMENT HEAD'S SIGNATURE — 5-29-90 — DATE

Responds to questions and complaints involving human safety in the libraries. Serves as liaison with Special Services and the Learning Resources Center in the provision of library services to the disabled.

Emergency Coordinator

Serves a Emergency Coordinator of the Library and has primary responsibility for handling emergencies, including but not limited to fire, flood, earthquake, riot or other civil disturbances, bomb threats, etc. Works with the campus Emergency Team in maintaining readiness to deal with emergencies. Serves as Chair of the Library's Emergency Committee, which strives to keep the staff aware of emergency procedures; revises as necessary the Library's Emergency Manual.

In the event of a disaster, serves as the Recovery Operations Director, working closely with the Preservation Officer. Duties include the supervision of volunteer work forces, employees, coordination of the activities of any others outside the institution who become involved in the recovery operation, coordination and the supervision of the in-house communication system, (including the use of runners), and the enforcement of safety regulations for all workers.

THE CENTER FOR RESEARCH LIBRARIES
JOB DESCRIPTION

POSITION: Director, Access Services Division

JOB SUMMARY: Responsible under the general direction of the President for directing lending, document delivery and stack maintenance programs.

MAJOR DUTIES:

1. Serves on the Center's Directors Council, working with the Directors and President in planning and monitoring the effectiveness of Center operations to meet its membership service needs.
2. Plans, controls and directs the Access Services Division, in consultation with the President, with responsibility for oversight of fiscal, staffing, technical and programmatic activities.
3. Works with the Executive Office in preparing program statements and fundraising proposals related to access services programs.
4. Acts as President in consultation with the other Directors in the President's absence.
5. Represents the Center at appropriate meetings as assigned.
6. Conducts research studies related to access services programs.
7. Maintains primary responsibility for the Service Policy Manual.
8. Prepares and executes the divisional budget.
9. Drafts, revises, produces and distributes access services program documents, in conjunction with committees and other staff.
10. Serves as the staff liaison to the Interlibrary Loan Officers Advisory Panel.
11. Advises and recommends to the President on matters related to collection programs.

SKILLS AND TRAINING:

1. Master's degree in Library Science or equivalent combination of education and experience.
2. Thorough knowledge of Interlibrary loan and document delivery processes and current practice in a cooperative research library environment.
3. Demonstrated planning and management skills.
4. Superior written and oral communication skills.
5. Knowledge of current practices in stack space planning and utilization for housing major research library collections.

EXPERIENCE:

1. Minimum seven years' progressively responsible related experience.
2. Minimum three years' prior management experience.

SUPERVISION: Directly supervises 2.0 FTE professional staff. Reports to the President.

19900701 - 16

THE CENTER FOR RESEARCH LIBRARIES
JOB DESCRIPTION

POSITION: Head, Circulation Department

JOB SUMMARY: Responsible, under the general direction of the Director Access Services Division, for managing and planning activities in support of end user services: verification of holdings, interpretation of policies, document delivery and use of Reading Room.

MAJOR DUTIES:

1. Manages operations of the department which includes verification of holdings, document delivery and the Reading Room.
2. Provides leadership in planning, implementing and evaluating goals and objectives of the department.
3. Oversees the collection of data on use of the collection and other departmental activities as needed.
4. Prepares and monitors departmental budget.
5. Serves as backup to professional staff.
6. Responds to department's correspondence.
7. Assists interlibrary loan and reference librarians at member institutions in utilizing the Center's resources.
8. Serves as liaison for resolving interdepartmental workflow conflicts and developing procedures related to bibliographic records, orders, new acquisitions, orders and retrieval of material.
9. Approves the hiring of candidates for clerical positions and recommends the hiring of candidates for professional and supervisory positions.
10. Oversees the training of staff.
11. Assumes a major role in all planning activities of the Access Services Division.
12. Serves on Center committees as assigned.
13. Participates in member visits to the Center as assigned.
14. Represents the Center at meetings as assigned.

SKILLS AND TRAINING:

1. Master's degree in Library Science, or equivalent combination of education and experience.
2. Thorough knowledge of current interlibrary lending and document delivery practices and procedures.
3. Sound bibliographic skills relevant to reference functions.
4. Superior supervisory and management skills.
5. Superior oral and written communication skills.

EXPERIENCE:

1. Minimum five years' progressively responsible experience in a university or large research library.
2. Minimum three years' supervisory experience.
3. Minimum two years' experience in reference or interlibrary lending services.

SUPERVISION: Directly supervises 2.0 FTE supervisory staff. Reports to Director, Access Services Division.

THE CENTER FOR RESEARCH LIBRARIES
JOB DESCRIPTION

POSITION: Head, Stack Management Department

JOB SUMMARY: Responsible, under the general direction of the Director of Access Services Division, for managing and planning activities in support of physical access to the collection: retrieval and reshelving; space allocation; additions to collection and general preservation efforts.

MAJOR DUTIES:

1. Manages all operations of the department which includes retrieval and reshelving, space allocation, integration of incoming material and physical maintenance of items in the collection.
2. Provides leadership in planning, implementing and evaluating goals and objectives of the department.
3. Oversees the collection of data on collection components and other departmental activities as needed.
4. Prepares and monitors departmental budget.
5. Serves as backup to supervisory staff and Searcher.
6. Serves as liaison for resolving interdepartmental workflow conflicts and developing procedures related to bibliographic records, new acquisitions, deposits, space allocation and storage needs.
7. Approves the hiring of candidates for clerical positions and recommends the hiring of candidates for professional and supervisory positions.
8. Oversees the training of staff.
9. Supervises the unpacking and sorting of material backlogs and incoming deposits.
10. Assumes a major role in all planning activities of the Access Services Division.
11. Serves on Center committees as assigned.
12. Participates in member visits to the Center as assigned.
13. Represents the Center at meetings as assigned.

SKILLS AND TRAINING:

1. Master's degree in Library Science or equivalent combination of education and experience.
2. Knowledge of current library storage and retrieval procedures and practices.
3. Superior supervisory and management skills.
4. Superior oral and written communications skills.

EXPERIENCE:

1. Minimum five years' progressively responsible experience in a university or large research library.
2. Minimum three years' supervisory experience.

SUPERVISION: Directly supervises 2.0 supervisory and 1.0 clerical staff. Reports to Director, Access Services Division.

19900701 - 13

University of Florida

POSITION DESCRIPTION

POSITION: Chair, Access Services Department

RESPONSIBLE TO: Assistant Director for Public Services

JOB SUMMARY: Responsible for managing the overall operations of the Access Services Department consisting of Circulation Desks (Libraries East and West); Reserve Desk; Collection Access Division; Periodicals Floor; Microform Center; library courier service; Interlibrary Loan Office; and the Journalism Reading Room.

DUTIES AND RESPONSIBILITIES:

1. Develops and manages services, allocates and monitors resources, and establishes and reviews policies and procedures of the Access Services Department.

2. Coordinates the planning, implementation and revision of department and unit goals and objectives with the various departmental unit heads.

3. Insures the effective management, utilization and development of department personnel. Directly supervises the Assistant Access Services Librarian, the Interlibrary Loan Librarian, the program coordinators for Circulation and Collection Access, and the General Services Senior Clerk.

4. Provides coherent and effective direction for all unit heads in regard to administrative requirements (reports, budgeting, etc.)

5. Coordinates policy and procedure development for all Access Services Department units. Communicates with other library ststem units regarding the recommendation, interpretation, and coordination of circulation policy and procedures.

6. Serves as library-wide authority on the NOTIS circulation module. Plans for implementation of enhancements, revisions, etc.

7. As needed, participates in the planning and implementation of library-wide space renovation and reorganization efforts.

8. Represents all Access Services Units at the Library Management Group and other administrative meetings.

9. Oversees the issuance of borrowing privileges to persons not affiliated with the University of Florida.

10. Represents the library at various external meetings (e.g. RLG, FCLA, FLIN, etc.) concerning access policies, circulation, ILL, etc.

11. Serves on library and university committees, participates in state, regional and/or national library associations, contributes professionally as an author or consultant or in other appropriate ways.

McMASTER UNIVERSITY

POSITION ACCOUNTABILITY STATEMENT

POSITION: Head, Circulation Services DATE: January 29/90

INCUMBENT:

LOCATION: Mills Memorial Library

SUPERVISOR:
Associate University Librarian,
Reader Services

ACCOUNTABILITY

The Head, Circulation Services, is responsible for the organization, control and management of the Circulation, Stacks/Control, Reserve Reading Room and Interlibrary Loan sections of Mills Memorial Library and for coordination with other areas of the University Library System, so that the needs of users are matched with the resources available; and for the coordination of circulation system related matters within the University Library system.

REPORTING RELATIONSHIPS

The following positions report directly to the incumbent: Interlibrary Loan Librarian; Supervisor, Circulation/Reserve; Supervisor, Stacks/Control.

DIMENSIONS

Directly supervises three supervisors; indirectly supervises twenty-eight support staff (three part-time).

Circulation Services provides users of Mills Memorial Library with access and service to the main stack collection of over 760,000 volumes, to the Reserve Reading Room collection of approximately 14,000 items, and to the research facilities of Interlibrary Loan. Over 270,000 items from stacks are charged out to users each year; nearly 150,000 reserve loans are recorded, the Interlibrary Loan Section borrowed and received nearly 21,000 items. Approximately 900,000 patrons use the facilities of Mills Memorial Library annually.

WORKING RELATIONSHIPS

Daily to weekly contacts with the Reference Services area for consultation, coordination of circulation procedures and resolution of problems.

Daily to weekly contacts with Processing Services and Collections for the resolution of problems with material in the stacks collection; ordering new books, withdrawals, storage, repairs, etc.

Regular contacts with the Systems Development Office on systems developments affecting Circulation Services.

Regular contacts with the Library Personnel Office and Administrative Services to clarify personnel policies and to discuss budget allocations and expenses, fines procedures and accounts, purchase of equipment, etc.

Regular contacts with other libraries on campus to discuss policy matters of common concern, difficulties with borrowers, circulation-system problems, etc.

Occasional contacts with faculty, the Deans, the University Business Office and the Office of the Registrar to discuss policies, procedures, student records and problems with borrowers.

Occasional contacts with Computer Information Services (C.I.S.) to discuss the operation of the circulation system: special requests, downtime, printouts, system modifications, etc.

Regular contact with the faculty, graduate, undergraduate and other users of the McMaster Library System to discuss problems, resolve disputes, explain policy, etc.

Occasional contacts with librarians from other institutions or with sales and service representatives to discuss McMaster's circulation and security systems, loan policies, equipment, the Inter-University Borrowing Project, etc.

COMMITTEES

-Chair, Circulation/Reserve Operational Group

-member, Reader Services Heads

SPECIFIC ACCOUNTABILITY

1. Interviews, selects, trains and supervises the Heads of sections; assists them in developing library and supervisory skills; advises them on library and university policy and procedures; evaluates their performance by preparing annual performance reviews.

2. Organizes and manages the Circulation Services area and is responsible for the level of service provided to users:

   a. coordinates staffing, workloads, personnel matters and related problems in the four sections.

   b. recommends, develops and implements policies and procedures for Circulation Services.

   c. ensures that staff are familiar with departmental and library service goals and that a consistent level of service is maintained in all areas to meet the needs of our varied clientele.

   d. prepares monthly and annual reports, and required statistical surveys.

   e. assists in the preparation of budget submissions and monitors expenditures.

   f. submits requests for new and replacement equipment.

   g. advises the Associate University Library for Reader Services on Circulation Services matters.

   h. monitors the use of space in Circulation Services and projects space requirements for staff, service, and collections.

3. Coordinates circulation systems related matters:

   a. provides information, and advice to the Library Administration and to the Systems Development Office on automated systems and associated equipment.

   b. prepares internal reports to assist in the decision-making process.

   c. ensures that the Circulation/Reserve supervisors in all libraries are involved in ongoing discussion and examination of any proposals, changes, etc. involving the circulation system, and in the related policies and/or procedures.

   d. investigates any system problems and initiates requests for further investigation by C.I.S.; initiates requests for changes and enhancements to the system.

SPECIFIC ACCOUNTABILITY - continued

3. e. acquires a knowledge of online circulation systems and relevant automated data management systems.

4. Supervises the maintenance of the stack collection to serve the needs of current and future undergraduates and researchers:

   a. orders additional copies of most-used books and replacement copies for missing and damaged books.

   b. advises on criteria and weeds the collection for storage and withdrawal; ensures that stored materials are accessible to users through database changes, retrieval procedures, etc.

   c. monitors condition of materials in the collection and makes judgments on brittle books that should be replaced.

5. Acts as the McMaster representative for the Inter-University Borrowing Project (OCUL) and for the Reciprocal Faculty Borrowing Program (OCLC), providing information to potential users, ensuring that correct procedures are followed, and that any problems are resolved.

6. In conjunction with the Associate University Librarian for Reader Services, assists in library planning, administration, and in the development of library policy.

PROBLEM SOLVING

The incumbent is responsible for the organization and management of the Circulation Services area, for the resolution of problems experienced by users of its facilities and for the analysis and assessment of present operations and future requirements. The incumbent requires a thorough knowledge of both library and university policies and procedures to coordinate the circulation services of the University Library System.

Coordinating the services provided by the Interlibrary Loan Section, the Circulation Desk, Reserve Reading Room and Stacks/Control section requires judgment in hiring and training personnel and in assigning workloads to meet staff potential and user demands. Administrative skills are required to ensure that all sections are consistent in the application of policies and procedures and in the provision of high levels of service, and that any service problems are resolved quickly.

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PROBLEM SOLVING - continued

Skill in handling difficult public service situations is important. For example, users concerned by Circulation Services loan or reserve policies, borrowers unwilling to pay fines, or patrons stopped by the security system must be treated with tact and consideration while interpreting and explaining library policy. Each situation is analyzed, discussed with the user and the section head, and with others when necessary, to ensure fair treatment.

In-depth knowledge, judgment and foresight are required to analyze current operations and services and to propose modifications and changes based on external and internal requirements and on the availability of future technology. For example: an analysis of the implications of online reference/circulation systems on Interlibrary Loan operations; a proposal for a new circulation system that takes into account both user needs and future technology; a proposal for the use of compact shelving in public service areas.

SIGNED:

INCUMBENT _____ _____ DATE March 14/90

ASSOCIATE UNIVERSITY LIBRARIAN _____ DATE March 14 '90

UNIVERSITY LIBRARIAN Graham R. Hi DATE 90/iii/15

University of Missouri
Columbia

ACC/14024

POSITION DESCRIPTION

Title: Head, Access Services Division
Classification: Librarian III
Administrative Unit: Access Services
Responsible To: Director of Libraries

Direction, administration and coordination of automated circulation and reserve system, interlibrary resource sharing, current periodicals reading room, shelving, and library annexes/Tate Hall.

SPECIFIC DUTIES

Personnel

1. Interview, select and recommend staff for appointment.
2. Counsel, advise and recommend staff for promotion and termination.
3. Supervise staff training and encourage job-related staff development.
4. Conduct staff meetings on a regular basis.
5. Develop and continuously revise job descriptions.
6. Approve schedules, absences and time sheets of department heads.
7. Maintain central control of student hours and department needs for budgeting purposes.
8. Advise supervisors on procedures for interviewing, hiring, scheduling, training, transferral and termination of subordinates.

User services

1. Schedule open hours for services.
2. Recommend, interpret and enforce library policies.
3. Approve and coordinate procedures in Access Services departments.

4. Establish and maintain ease of access to library materials.

5. Serve as primary contact in established reciprocal borrowing agreements with other libraries.

Data Processing Activities

1. Supervise automated activities and equipment maintenance in the division.

2. Communicate with Library Systems Office for requesting work, determining needed program changes, and resolving problems.

3. Plan and coordinate bar coding projects.

4. Plan for future needs with library administration, appropriate library staff, and the Library Systems Office.

Other

1. Establish and maintain good relations with departments outside the library which provide assistance to the division.

2. Maintain good communication and coordination of policies and activities with other library departments/branch libraries.

3. Participate in library and campus affairs through committees and special assignments.

4. Participate in seminars and meetings related to Access Services.

JOB RELATIONSHIPS

INTERNAL: Frequent contact with other managers in the library system. Daily contact with Access Services staff.

EXTERNAL: Frequent contact with patrons in interpretation of policy, explanation of services and procedures, and granting of unusual requests.
Occasional contact with other libraries in discussing policies and agreements for service.
Frequent contact with the Library Systems Office regarding the circulation/reserve subsystem.
Occasional contact with programmers/systems analysts or hardware maintenance personnel from Campus Computing.

Occasional contact with other University departments (such as Cashier's, Campus Computing, the ID Card Office)

SUPERVISION OF PERSONNEL

Supervision of one Librarian III, two Library Assistant IIs, five Library Assistant Is, six Library Clerk IIIs, ten Library Clerk IIs, and approximately 60 student assistants.

JOB REQUIREMENTS AND QUALIFICATIONS

EDUCATION: ALA-accredited MLS

EXPERIENCE: Minimum of five years, including supervision. Minimum of two years in public services activities, including circulation and/or interlibrary loan.

SKILLS AND ABILITIES: Communication skills, managerial abilities, adaptability, familiarity with computerized systems, ability to deal with a wide variety of attitudes, temperaments, and personalities.

Revised March 1990

jd14024.acc

UNIVERSITY OF NEBRASKA-LINCOLN
UNIVERSITY LIBRARIES
MARCH, 1991

POSITION DESCRIPTION
Name-Debra Pearson
Rank/Title-Assistant Professor; Head, Circulation Services
Division-General Services
Supervisor-Kate Adams

MAJOR RESPONSIBILITIES: Overall management of the Circulation Services unit in Love Library.

DUTIES:

1) Direct and manage all areas of Circulation Services including:
   - -Circulation Desk
   - -Reserves
   - -Stacks Maintenance
   - -Building and Collection Security
   - -Delivery Service

2) Oversee major shifts of the collections in Love Library.

3) Oversee the preparation of the unit's hourly wage budget and monitor its expenditure.

4) Manage patron notification and fine operations for the University Libraries including:
   - -Fines and billing
   - -Overdues, holds, and recalls

5) Directly resolve major fine and bill problems. Serve as liaison for the University Libraries with the offices of Student Judicial Affairs and the University Ombudsman. Provide advice and direction to branch personnel on fine and bill problems.

6) Coordinate circulation and reserve procedures, regulations, and policies for the University Libraries. Recommend policies as necessary.

7) Coordinate search and claim return procedures.

8) Advise appropriate staff of problems with uncataloged materials, incorrect location markings, incorrectly marked items, missing-in-inventory items, inaccurate

online bibliographic records, lost materials, untargeted periodicals, and binding problems.

9) Coordinate IRIS circulation at UNL
   -Train key personnel for all UNL libraries in circulation functions
   -Act as liaison with branch circulation personnel

10) Establish and maintain a good working relationship with the libraries at post-secondary institutions participating in the Reciprocal Borrowing Agreement.

11) Promote public relations within the department.

12) Assume responsibility for Circulation Services personnel-- employ, train, supervise, and evaluate classified and B-line staff.

13) Other duties as needed.

Director, Access and Computing Services
University of New Mexico General Library

Responsibilities:

1. Responsible for the operation of the Access Services Department including the functions of circulation, reserve book room, and interlibrary loan. Recommends and implements policies and procedures and coordinates circulation and reserve desk activities with the four branch libraries. Supervises 2 faculty positions, 16 staff positions, and approximately 50 part-time student employees. Oversees all training and hiring for the department. Implements and coordinates library policies and programs including stack maintenance, patron registration, fines and lost book billing, overdues and recalls, building security, interlibrary loan agreements, in-house storage, AV material circulation, and allocation of conference rooms, carrels, and lockers. Maintain and analyze departmental statistics.

Responsible for coordinating all computing operations of the General Library. In consultation with the Council of Department Heads, approves purchases of computing equipment. In consultation with the Council of Department Heads and with the Advisory Council on Automation identifies the computing needs of the Library and develops long range planning documents. Coordinates the General Library's automation efforts with other local and regional institutions and agencies. Promotes the development and expansion of the Library's databases. Assists in evaluating new automated systems. Assists with the installation of new systems and equipment.

Participates in system wide planning as a member of the Council of Department Heads which is the main administrative body for the UNM General Library. Participates in all aspects of budgeting for the library including salary distributions.

2. Administers the LS/2 circulation and inventory control system (formerly called DataPhase ALIS II). Manages all ongoing operations for this system including training, coordination with the branches, installation of equipment, and planning for expansion of the system.

3. Administers the Carlyle Online Public Access Catalog system. Manage all ongoing operations for this system including training, coordination with branch libraries and other university departments, installation of equipment, and planning for expansion of the system.

4. Administers the Library's Document Delivery Services. Oversees all training and hiring for the DDS. Serves as liaison for off-campus contracts for this operation.

5. Administers the Library's Kurzweil Reading Machine Program and the Library's services for the handicapped.

6. Acts as resource person for online searching.

7. Chairs the Library's Advisory Council on Automation.

UNIVERSITY OF NOTRE DAME

DEPARTMENT OF HUMAN RESOURCES

November 1989

TITLE: Head, Access Services

DEPARTMENT: University Libraries (020)

REPORTS TO: Associate Director

CLASSIFICATION: Administrative X CODE: 015 FLSA:

GENERAL SUMMARY:

Responsible to the Associate Director for the administration, planning, evaluation, budgeting and policy formulation for a broad range of services in the Theodore M. Hesburgh Library, including Building Services, Circulation/Stacks, Reserves, Current Periodicals/Microtext, and Audio-Video services; supervises more than 30 full time staff and at least 7 FTE student assistants; coordinates circulation policies and activities in all University Libraries; administers systemwide NOTIS automated circulation module; as a member of the Libraries' Administrative committee, participates actively in library-wide planning and budgeting.

SPECIFIC RESPONSIBILITIES AND DUTIES:

Develops and implements general policies on the storage of, access to, and use of materials in the general collections and equipment of the Hesburgh Library.

Oversees and evaluates the provision of services provided by the Access Services Department assuring that all services are provided in an effective and efficient manner.

Plans and administers the system-wide automated circulation system, including further system enhancements, service policies, training, and daily operations.

Interprets library access and circulation policies and resolves patron disputes as they arise.

Develops and monitors as approved the budget for the department.

Provides leadership and supervision to assist all units in the department in supporting library goals and policies.

Plans staffing and staff development and training for all units in the department.

Sees to the establishment of and adherence to appropriate service standards in all units.

Plans for general collection and service space utilization in the Hesburgh Library.

Oversees the planning and implementation of any necessary shifts of collections in the Hesburgh Library.

Oversees physical maintenance and security in the University Libraries.

Approves issuance of all Special Borrower's cards.

Establishes and disseminates the service schedule and emergency roster for the University Library system.

Administers the closed carrel policies, including the allocation of carrels to individual academic units.

Approves local individual participants in any reciprocal or special access/borrowing programs such as RLAC and the Johnb Crerar Library.

Coordinates replies to patron suggestions.

Servés, as appropriate, on library committees and task forces.

The General Summary and Principal Duties and Responsibilities sections summarized above provide a representative listing only and should not be regarded as a complete statement of tasks performed by incumbents of this position. It should be recognized, therefore, that employees may be asked to perform job related duties beyond those outlined above.

WORKING RELATIONSHIPS:

Works under the direction of the Associate Director. Has frequent contact with faculty and students. Works closely with other library department heads and with outside librarians and vendors.

EDUCATION REQUIRED:

Bachelor's degree with additional education or training in

management/supervision highly desireable

KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED:

Three to five years of successful supervisory experience, preferably in a library setting.

Working experience with automated integrated library systems.

Ability to work effectively with very diverse types of individuals.

A commitment to service and an openness to innovation.

Excellent planning and communication skills.

Demonstrated good supervisory skills.

Good oral and written communication skills.

WORKING CONDITIONS:

Works in a clean, well lit office environment with no direct exposure to physical hazards.

This statement accurately describes the work performed in one position in the above division.

_____ _____

DATE APPROVING SUPERVISOR'S SIGNATURE

UNIVERSITY OF NOTRE DAME

DEPARTMENT OF HUMAN RESOURCES

November 1989

Title: Assistant Head, Access Services

Department: University Libraries (020)

Reports To: Head, Access Services

Classification: Administrative _____ Code: 015 FLSA:

GENERAL SUMMARY:

Assists the Head, Access Services in providing overall direction, planning, evaluation, budgeting and policy making for Access Services. Assists in reviewing policies and writing reports. Assumes responsibility for Access Services in absence of the Head.

PRINCIPAL DUTIES AND RESPONSIBILITIES:

Assists in overseeing and evaluating the provision of services provided by the Access Services Department (circulation, inventory, stack maintenance, audio/video center, copy center, reserve book room, current periodicals, microtext, and library monitor staff) assuring that all services are provided in an effective and efficient manner.

Interviews, selects, and oversees training and performance of department staff (circulation, inventory, stack maintenance, audio center, copy center, reserve book room, current periodicals, and microtext). Evaluates performance and recommends to the Head, Access Services personnel actions, such as merit increases, promotions, disciplinary actions, etc. Maintains good employee relations. Provides for in-service training and continuing education for the department personnel.

Responsible for keeping current with technical needs and advances in the Audio/Video Center, Current Periodicals Center and Microtext Center.

Receives problems/complaints from library patrons regarding services provided. Takes appropriate action to resolve issues within established library policy or recommends policy changes to the Head, Access Services.

Assists in the planning and monitoring of major library projects within the department.

Writes reports regarding services provided, recommends

changes in services, policies, etc. as requested by the Head, Access Services.

May assist in the preparation of the budget request for the department.

Serves on library committees and Task Forces.

The General Summary and Principal Duties and Responsibilities sections summarized above provide a representative listing only and should not be regarded as a complete statement of tasks performed by incumbents of this position. It should be recognized, therefore, that employees may be asked to perform job related duties beyond those outlined above.

WORKING RELATIONSHIPS:

Works under the direction of the Head, Access Services. Has frequent contact with faculty and students regarding problems, requests, etc. Works closely with other library department heads. Occasional contact with outside librarians and vendors.

EDUCATION REQUIRED:

Bachelors degree with additional training in management/supervision beneficial. Significant and relevant additional library experience may be substituted for part of the educational requirement.

KNOWLEDGE, SKILLS AND ABILITIES REQUIRED:

Strong public relations and organizational skills necessary in the course of providing direction to the overall department.

Proven verbal and written communication skills necessary to communicate with faculty, staff and subordinate employees.

Previous academic library experience required.

Three to five years successful supervisory experience required.

WORKING CONDITIONS:

Works in a clean, well lit office environment with no direct exposure to physical hazards.

This statement accurately describes the work performed in one position in the above division.

12/7/89
DATE

APPROVING SUPERVISOR'S SIGNATURE

JOB DESCRIPTION UPDATE

Purdue University
Date 1/22/90

ADMINISTRATIVE/PROFESSIONAL POSITION DESCRIPTION

Departmental Information

Department Name	Department Number	Position Control Number
Academic Services-Libraries/HSSE-Circulation	1530	220

For questions concerning position contact: T. L. Haworth (Name) 42899 (Phone Number)

Position Information

Position Title: HSSE CIRCULATION LIBRARIAN

- ☐ New ☒ Existing
- ☒ Regular ☐ Temporary (If temporary, indicate expected duration) _____
- ☒ Full-Time ☐ Part-Time (If part-time, indicate recurring FTE) _____
- ☒ Fiscal Year ☐ Academic Year (If academic appointment, indicate months) _____

Position Summary

Summarize in one short statement the basic function of the position.

Manage the Circulation and Shelving Units of the HSSE Library with responsibility for providing loan, security, and location information for Faculty, Staff, Students and Campus Visitors. Serve as lead Librarian for implementation of on-line circulation system for entire library system. Responsible for providing collection maintenance for approximately 750,000 volumes.

Position Duties and Responsibilities

Describe each of the major duties and responsibilities in their order of importance. Be as detailed as possible in your description. Estimate the percentage of time required for each. If more space is needed, attach additional pages.

		%
1.	Manage the Circulation Unit. Provide loan, security, and location information for Faculty, staff, students, and campus visitors. Administers overdues and penalties for the HSSE Library, Initiate, implement, and interpret circulation policies and procedures.	25%
2.	Manage the Shelving Unit. Provide collection maintenance for approximately 750,000 volumes. Monitor and improve procedures for keeping the collection in order, shelving of oversized materials, and library housekeeping. Set up systems and procedures to maximize access and minimize costs of servicing the collection.	25%
3.	Serve as lead Librarian for implementation of on-line circulation system for entire library system.	25%
4.	Hire, train, schedule and evaluate staff consisting of 8 FTE in circulation and 4½ FTE in Shelving Unit.	10%
5.	Directs control over accuracy of monograph records, continually inventorying the HSSE collection to provide basis for record corrections and management information.	2%
6.	Administer system-wide penalties for circulation infractions by sending notices, establishing and collecting fees, and working with the University Bursar and Registrar. a. Responsibility for decision or replacement of lost or missing materials.	8%
7.	Serves as leader for solving system-wide library circulation problems.	5%

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Qualifications

Minimum Education Required: MLS

Minimum Work Experience Required: Public service and circulation experience in academic library environment

Describe any special training, knowledge, skills or abilities ~~required~~ desired: Experience with automated circulation systems. Ability to work effectively with Faculty, students, staff. Supervisory experience.

Supervision

Does this position have supervisory responsibility: ☒ Yes ☐ No

Number of people directly supervised:	Full-Time Employees	(indirectly) Part-Time Employees
Administrative/Professional		
Clerical	8	20-25
Service	4.5	12

Describe the responsibility for hiring, firing, promoting, etc. All aspects

Describe the supervision received: Independent supervision. Analyzes and establishes methods, processes, etc. and is accountable for results.

Job Content

Does this position require discretion and independent judgement be regularly exercised? If yes, please give examples:

Supervision, scheduling, administering policies, developing procedures.

Describe the positions areas of responsibility that involve original, creative work and/or application of new approaches, methods, techniques, procedures, etc.

Interpretation and review of policies and procedures. Applies library principles to solving complaints, etc. Identifying and determining priorities. Plan future requirements.

What percentage of the job is spent performing tasks that are routine or standardized: Minimal

Barbara Fuzzell — Supervisor — 1/22/90 — Date — C R Mobley — Department Head — 1-23-90 — Date

The information below includes the staff classification/exemption determination and related codes established by Personnel Services for the above described position. Questions concerning this information should be direct to the Supervisor, Job Analysis — Wage and Salary Administration.

Staff Classification 0050A12 Professional ☒ Exempt ☐ Non-Exempt

JIC 15203 POC 522 FOC 100 EEO-6 06 ED IXX

Analyst M. S. Tyrrell Date 1/24/90

UNIVERSITY OF SASKATCHEWAN LIBRARIES
POSITION DESCRIPTION

TITLE: Head, Circulation Department

REPORTS TO: Assistant Director of Libraries (Public Services)

RESPONSIBILITIES:

Responsible for the development and administration of effective circulation services in the Main Library. Assists at the Reference Desk a few hours per week. Serves as a member of the Library Management group.

DUTIES:

1. To plan, implement and evaluate policies and procedures necessary for effective circulation service.

2. Direct efficient circulation of materials including the development of the reserve collection, of the stacks, and the Library Storage System.

3. Responsible for maintaining and circulating off-campus collection and for circulating materials to off-campus borrowers.

4. Chairs the Circulation Users' Group.

5. Keeps current on automated circulation system technology.

6. Keeps current on circulation issues in a University setting. Maintains familiarity with University programs, research needs as well as specific faculty and student needs.

7. Manages and supervises 12 full time and 4.6 seasonal classified personnel. Encourages staff to work in a collaborative manner and facilitates an overall cooperative environment in the Circulation Department. Coordinates the organization of work flow. Responsible for interviewing, hiring, training, and evaluation of staff. Assists staff in the resolution of conflict/problems. Coordinates meetings among staff and with staff/supervisors on a regular basis.

8. Focuses on public relations. Helps project a public image of pleasant and efficient proformance. Assists borrowers and adjusts complaints. Serves as a liaison to Library Administration and to the larger University community.

9. Assists at the Reference Desk on a limited basis.

10. Prepares annual and statistical analysis and written reports as required.

11. Participates in preservation activities - bindery, repair, replacement of stack materials.

12. May be involved in selection of materials and library orientation.

July 13, 1990

Name Colleen Cook Date ____ 86

JOB DESCRIPTION
TEXAS A&M UNIVERSITY
UNIVERSITY LIBRARIES

DIVISION/DEPARTMENT Circulation Division

1. Position Title & Code: Assistant Professor 7300

   PIN Number: M03484

   Job Title: Head, Circulation Division, and Automation Coordinator

   Regular Hours of Service: 40 hrs/week

2. Organizational Relationship

   a. Reports to (Title): Assistant Director for Collection Development

   b. Supervises (Title): Head, Interlibrary Services Dept., 2 Library Assistants II; 2 Library Assistants I

3. Function of Position

   To provide overall administration and management of the Circulation Division (Interlibrary Services, Circulation, Shelving, Reserve, and Current Periodicals Departments) and to plan, evaluate, and coordinate activities related to an automated integrated library system.

4. Characteristic Duties and Responsibilities

   Circulation Division

   Responsible for planning, administration, supervision, evaluation, and coordination of Circulation Division personnel and activities, including circulation control and security for general stack materials, shelving, and Reserve, Current Periodicals, and Interlibrary Services operations. Develops procedures for evaluating the effectiveness of Circulation Division services and implements changes as necessary to meet user needs. Establishes policies and procedures for the Division within the framework of Library goals and objectives. Maintains an awareness of regional and national trends and activities in circulation, interlibrary services, and management. Provides guidance for all Division personnel in career growth and development. Maintains and provides good public relations with Circulation Division users; recognizes and solves exceptional problems of users. Participates in decision making with other Collection Development Division Heads.

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Automation

Responsible for planning, evaluation, and coordination of activities involving the Library's automated, integrated system. Analyzes present and potential problems and implements appropriate solutions. Maintains an awareness of regional and national trends and activities in library automation. Coordinates automation activities in consultation with the Library's Automation Advisory Committee. Coordinates and works with Systems Programmer in the implementation of the integrated system and the development of future systems.

Other

Serves on library and university committees as needed. Fulfills professional responsibility by attending local, state, and national meetings and pursuing research and scholarly endeavors. Other related duties as required for effective Library operations.

5. Minimum Acceptable Qualifications

a. Personal Qualifications

Demonstrated ability to work effectively with faculty, staff and students. Flexibility, initiative, good organizational and supervisory skills, and positive public service attitude. Effective written and oral communication skills. Ability to work effectively with all library units using the integrated system; ability to analyze and initiate discussion of potential and existing problems and to recognize and derive solutions.

b. Educational Qualifications/Experience

Masters degree from an ALA-accredited library school. Minimum of six years professional (post-MLS) experience, preferably in automation-related activities in an academic library. Circulation experience desirable. Thorough knowledge of and experience with library automation and integrated library systems, including circulation, public access, cataloging and acquisitions functions. Thorough knowledge of library bibliographic utilities, preferably OCLC. Progressively responsible supervisory experience.

c. Business

6. Standards of Performance

Demonstrated success in the performance of duties. Interest in job and in continuing professional growth and development. Satisfactory annual evaluation. Must meet requirements for promotion and tenure.

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WASHINGTON UNIVERSITY LIBRARIES

LIBRARY POSITION

POSITION TITLE: Head of Circulation Services

REPORTS TO: Associate Dean for Collections and Services

SUMMARY: The Head of Circulation Services is responsible for providing flexible, responsive leadership in the management of Circulation Services. This includes the development and implementation of a cohesive Circulation Services organization within the Circulation, Reserve, and Shelving Units, as well as contributing to cooperation among all service areas within the library.

QUALIFICATIONS:

Education

Master's degree required; MLS preferred.

Experience

At least three years of supervisory experience, preferably in a research library.
Experience with automated systems.
Excellent communication skills.
Commitment to patron service.
Ability to work effectively in a collegial manner in a changing environment.
Understanding of the information needs of a research university.

DUTIES:

1.	Plan, recommend and implement proposals for developing a cohesive Circulation Services organization.	17%
2.	Interview, select, supervise, evaluate and make recommendations regarding personnel in Circulation Services.	15%
3.	Ensure the efficient and effective operation of the Circulation Unit.	20%
4.	Ensure the efficient and effective operation of the Reserve Unit.	10%
5.	Ensure the prompt and orderly reshelving of library materials as well as book stack maintenance.	10%

6.	Ensure an effective security system for the protection of the library's collections and other property.	1%
7.	Ensure that all service area concerns, including those relating to personnel, equipment, and space receive prompt attention and action.	7%
8.	Ensure the implementation of University and Library policies.	2%
9.	Provide professional leadership and assume responsibility for the morale and development of the staff in Circulation Services.	5%
10.	Coordinate circulation policies and procedures among Olin and the departmental libraries.	8%
11.	Perform other duties as required.	5%

8/16/90

UNIVERSITY OF WESTERN ONTARIO
UNIVERSITY LIBRARY SYSTEM

POSITION TITLE:	Head Circulation Services	YOUR NAME:	B. Patterson
DEPARTMENT:	Circulation Services	REPORTS TO:	Assistant Director for Public Services
LOCATION:	The D. B. Weldon Library	DATE:	1 August 1987

I. Position Summary

The incumbent is responsible to the Assistant Director for Public Services for the administration and effective operation of the Circulation and Ancillary Services which relate to the physical dissemination of materials to all users of The D.B. Weldon Library; for the planning and development of such services as may be further required to meet the needs of users; and for communication between this Department and the other libraries and divisions of the University Library System in the coordination of services.

Under the general direction of the Library Systems Manager, the incumbent is responsible for the development and daily operation of the Online Circulation System for the seven libraries in the University Library System.

II. A. Functions

1. Administration and Planning 30%

a. Oversees the operations of Circulation Services; ensures that standards of service are met, establishes an efficient work flow, and makes efficient use of staff time and talents by proper distribution of workloads.

b. Sets, in consultation with staff, the goals and objectives of the Department in the context of the goals and objectives of the University Library System and The D.B. Weldon Library.

c. Participates in formulating policies and procedures for the future and assists in the resolution of current problems in the University Library System by attendance at meetings of the University Library System Executive Committee; as a member of the Public Services Operations Group, and other committees as directed or nominated.

d. Presents own and staff's opinion on the implications of policies, procedures, and routines, to committees and to the Assistant Director when appropriate.

e. Explains to the staff of the Department the intent of University Library System policies, procedures, and routines.

f. Submits statements of space requirements for future expansion; requests and documents alterations to existing space.

g. Prepares a budget request, in hours required, for part time assistance; controls expenditure of the allocation given.

h. Initiates request for supplies, equipment, staff, etc., through the Assistant Director.

i. Prepares reports on the Department's activities for the Director of Libraries and others as required or directed.

j. Maintains and keeps up-to-date the records of the routines, attendance of staff, statistics of work done, etc., in the Department.

k. Coordinates the management and the operation of the Research Depository Library for the seven libraries in the Library System.

l. Coordinates some activities of the Public Services Division of the University Library System; e.g., Guest Borrowers services, Special Projects such as summer inventories, issuing replacement I.D. badges for users, standardization and consistency of forms.

m. Acts as the official representative of the University Library System at all meetings of the Inter-University Borrowing Project of the Ontario Universities Cooperative System. Is responsible for the successful operation of this service at The University of Western Ontario.

n. Acts as a resource person when requested by the Director of Libraries at meetings of the University Library Council and other user groups.

o. Ensures that all reports from Units and Departments are dispatched at the proper time.

2. Personnel 20%

a. Makes recommendations on the appointment and dismissal of staff. Ensures that the proper procedures involved in these activities are followed.

b. Ensures staff training programs are maintained.

c. Motivates and disciplines staff.

d. Evaluates the performance of staff reporting directly, and ensures that the performance appraisal program is carried out for staff of the Department.

3. Public Services 20%

a. Ensures that application by staff of the Lending Code and other Public Services procedural policies and routines is consistent with that of other libraries in the University Library System.

b. Receives users, discusses, and resolves their problems in such matters as requests for extended loans, violations of the Lending Code, exceptions to rules, borrowing regulations, and the like, where the problems are beyond the decision-making level of the staff.

c. In the light of the resolution of such problems, makes recommendations for changes in procedural policies to the Assistant Director for the consideration of the Public Services Operations Group.

d. Prepares notices and memoranda for users informing them of library procedures, practices, and services.

e. Communicates individually or collectively with members of PSOG on matters of common interest respecting services to users.

f. Keeps current with new developments in circulation services for library users.

4. Online Circulation System 25%

The incumbent reports to the Library Systems Manager for the library system requirements of the Circulation System and in this relationship is a member of the Systems Office Network. The specific responsibilities are

1. Systems Development

a. Convenes and chairs a group, the Circulation System Task Group; presents recommendations from this group concerning the system-related requirements of the Circulation System to the Library Systems Manager.

b. Communicates individually or collectively with members of PSOG on matters of common interest concerning the Circulation System.

c. Assists in the formulation of systems policies and priorities and in the resolution of current systems problems through participation in the System Office Network and other committees as directed or nominated.

d. Develops and documents procedures and supporting routines.

e. Provides Library System staff with notification of, training for, and documentation of changes to the Circulation System.

f. Develops and carries out tests to ensure proper functioning of the Circulation System.

2. Systems Operations

a. Schedules maintenance runs, irregular reports, and daily notices and reports; distributes such reports.

b. Maintains the Agency Parameters table.

c. Documents apparent system errors; initiates and participates in the process of resolving these.

d. Initiates the process of restoring the Circulation System during downtime; controls soft back-up during system downtime; communicates with library staff concerning downtime.

e. Controls supplies required by the Circulation System.

For the preceding, and other additional duties, the incumbent may delegate responsibility for performance of the functions to appropriate members of Circulation Services staff.

5. Processing 2.5%

a. Informs the Associate Director for Access Services of the special needs of the Department in the processing of materials.

b. Ensures that the procedures and routines of the Processing Division where they interface with the Department are understood and applied by the appropriate staff of the Department.

6. Collections Management 2.5%

a. Selects within the guidelines of the Assistant Director for Collections Management copies of titles to be added to the Heavy Demand Collection, and the Off-campus Collection.

b. Has the necessary request forms to acquire such titles prepared.

II. B. Qualifications

The position demands a librarian able to give leadership to the staff, through capable and equitable management, for the provision of service to users.

The incumbent is expected to develop a good working knowledge of the design and function of the Online Circulation System in particular, and of computer-based systems design in general.

The incumbent is expected to have a sound knowledge of all aspects of circulation services and systems and their effect on the good control and security of the Library's collections. Demonstrated organizational and human relations skills to handle the working relationships within the Department and with other Libraries, Departments, and Divisions outside the Department are necessary.

The incumbent must be able to communicate openly and honestly, from a base of sound information, on the functions and needs of the Department and the responsibilities of the Head with users, staff and the library administration.

III. Nature and Scope

A. Reporting Structure

1. The incumbent works

under the direction of the Assistant Director for Public Services. The position is one of five Department Head line positions in Public Services, The D. B. Weldon Library. There is no formal reporting schedule; consultation with the Assistant Director is informal on a day-to-day basis as required. This implies the exercise of considerable judgement in determining when consultation and referral is required.

through PSMT, and individually with the Heads of the Reference, Special Collections, Regional Collection and Serials Services Departments to ensure that the proper levels of service are maintained.

within the guidelines set by the Assistant Director for Collections Management to acquire library materials for the Reserve/Heavy Demand and Off-Campus collections.

In regard to the development and daily operation of the Online Circulation System the incumbent reports to the Library Systems Manager and is a member of the Systems Office Network.

2. The incumbent directs, supervises, and advises the supervisors of the four units of Circulation Services (Circulation Desk, Interlibrary Loans, Reading Lists, Stacks Maintenance) who in turn supervise 20 full time staff and 11,600 part time staff hours.

Also reporting directly to the incumbent are:
Secretary/Rebinding Assistant
RDL/ILL Assistant
Photocopy/ILL Messaging Assistant
Inventory Control Assistant
Problems Assistant-Circulation.

B. Span of Discretion

The incumbent has full responsibility for the management of Circulation Services, with independence to act and report to the Assistant Director for Public Services on matters concerned with the internal operation of the Department and on matters concerned with the interaction of the Department with other areas of the Library System.

The incumbent has full responsibility for the effective day-to-day operation of the Circulation System, with independence to act and report to the Library Systems Manager.

C. Contacts

The incumbent has regular contact, individually and collectively in meetings, with all Assistant Directors, all Librarians-in-charge, all Department Heads and staff members in staff positions to coordinate the functional interaction of his/her Department with other areas of the Library System.

The incumbent has regular contact with library users to represent the Library in discussions about the Library's services and procedures. The incumbent resolves users' problems with the Library's services and procedures that are beyond the decision-making level of the staff of the Department.

The incumbent has regular contact with Systems Analysts from DAS and senior administrative staff in the Registrar's Office and the Personnel Department to discuss problems with the operation of the Circulation System.

The incumbent has infrequent contact with librarians at other libraries (external to the Library System) to coordinate lending and interlibrary loan services between institutions.

The incumbent has infrequent contact with technical support staff at vendors of bibliographic databases (UTLAS, DOBIS, etc.) and other automated systems (Envoy 100, etc.) to discuss problems with the services provided.

D. Planning

The incumbent plans the day-to-day and long-term operation of Circulation Services to ensure that goals and objectives of the Department are met.

The incumbent has a responsibility to assert a leadership role in the planning of the use and development of the Circulation System. The incumbent is active in the discussions of the various committees that coordinate the use of automated systems in the Library, in his/her contacts with library users, and in his/her contacts with external departments.

The incumbent is an active participant in the planning processes of the following committees: PSOG, PSMT, CSTG, ICTG and SON, and of various ad-hoc committees that are from time-to-time given specific missions.

E. Special Demands and Challenges

Managing Size

The large size of the staff of Circulation Services can present challenges for its Head. Some activities related to personnel administration such as annual performance appraisals, the annual hiring and training of part-time staff, and special projects (e.g. writing job descriptions) are difficult to complete effectively because of the volume of work involved. The challenge lies in managing the successful completion of the whole project while making the event effective for the individuals involved.

Managing Diversity

The work environment of this position can be unsettling. The environment is often characterized by a rapid flow of various work inputs from a large number of sources. The position covers a wide range of activities. Work inputs are often received with a need for immediate action (e.g. serving users, keeping the Circulation System operational). The incumbent has a wide group of contacts from whom work inputs are received.

In this environment, a challenge for the incumbent is to effectively manage his/her time to give fair attention to all aspects of the position.

Managing Change

From time to time the incumbent is asked to manage the implementation of major changes made to the Circulation System by Geac. The incumbent is asked to manage the change within Circulation Services and coordinate the project for the Library System. Such projects challenge the incumbent's technical, communication and management skills in coordinating a large event.

Conflicting Responsibilities

The incumbent's two major areas of responsibility - managing Circulation Services and managing the operation of the Circulation System - can produce conflicts of interest. The incumbent must be careful to ensure that he/she is aware of the separate interests of the Department, the other Departments and Libraries, and the Library System as a whole when making

decisions related to the Circulation System. Serious conflicts of interest are reported to the senior staff.

IV. Standards of Performance

Performance will be measured on the expectations that:

a. Prompt, efficient, courteous service is given in the Department.

b. Good relations with users are maintained through fair and considerate attention to their needs.

c. Good working relationships are promoted and maintained within the Department and with other departments of the University Library System.

d. There is a high degree of familiarity with, and understanding of, the reasons behind University Library System policies and procedures as well as with the policies and procedures themselves.

e. Policies and procedures are followed and interpreted with integrity for users and staff.

f. There is an awareness of the developments, the commitments, and the services of all departments in the University Library System.

g. Reliable and factual communication is made to the Director of Libraries and the Assistant Directors on all matters of concern to the users and the staff of the Department.

Your signature	Signature of your immediate supervisor	Director or Assistant Director
	18 Sept '87	

SYSTEMS AND PROCEDURES EXCHANGE CENTER

MISSION AND GOALS STATEMENTS

ASSOCIATION OF RESEARCH LIBRARIES OFFICE OF MANAGEMENT SERVICES

Mission Statement

Brigham Young University

To assist individuals in their quest for perfection and eternal life.

The University is founded, supported, and guided by The Church of Jesus Christ of Latter-day Saints. It strives to assist individuals by providing a period of intensive learning in a stimulating setting where a commitment to excellence is expected and the full realization of human potential is pursued.

Harold B. Lee Library

To acquire, preserve and make available for use a collection of recorded knowledge in support of the goals of the University, to assist patrons in finding and using these resources and information resources elsewhere, and to foster and encourage learning and scholarship.

The Library is a major educational and cultural resource of Brigham Young University, the Church of Jesus Christ of Latter-day Saints, the local community, and the state of Utah.

HBLL Circulation Department

To serve the University Community by encouraging, facilitating and monitoring the circulation of library materials and by maintaining ready access to the library collection.

DEPARTMENT OBJECTIVES

1. Serve the patrons at the Circulation Desk in a courteous and timely manner.
2. Negotiate with patrons who bring concerns to the department to resolve problems equitably and to our mutual satisfaction.
3. Return used items to the shelves as rapidly and accurately as possible.
4. Provide additional services to the University Community as resources permit.
5. Provide challenging and fulfilling work opportunities to employees.
6. Establish an atmosphere that fosters continued personal growth and development.

General Circulation Desk Policies

The first objective of the circulation desk employee is to serve the patrons who come to the desk in a courteous and timely manner.

1. We serve all patrons who come to the Circulation Desk; regardless of academic rank, age, race, sex, or creed.

- **Patrons must present a valid University ID or Library Card (accompanied by a picture ID) to obtain service.**
- Exceptions must be approved by the Circulation Librarian.

2. We seek to provide service in as equitable a manner as possible.

3. We cooperate with other university and library departments in order to provide complete and efficient service.

   (The Law Library is a separate library with its own policies. Although we do cooperate with them, each library handles its own holdings separately. Complaints and other concerns must be handled directly by the library in question. Campus Learning Resource Centers are also independent from the HBLL Circulation Department. We encourage patrons to return materials to the location from which they were borrowed. Materials returned inadvertently to HBLL Circulation will be routed to the appropriate location -- but there is no guarantee as to the timeliness of this service.)

As we strive to serve the university and community, there are limits that we must establish to insure that our service is given appropriately.

* Patrons who fail to return library materials will be blocked from further charges (checkouts) until the issue of the non-returned item(s) is resolved.

* Patrons who have blocks/fines from any other library department must resolve them before receiving service at the circulation desk.

* Patrons who have more than $5.00 in library fines or fees will be blocked from charges until the fines are cleared or paid.

* At times of peak demand (when there are long lines), we must place limits on the number of some (time-consuming) transactions we can complete for each patron. These limits are as follows:

  a) Each patron in line will be limited to placing 3 holds or recalls in any one session, because these procedures are time-consuming. If the patron so chooses, he or she may wait in line again to place an additional 3 holds/recalls.

  b) Each patron in line will be limited to checking out 3 items not already listed in the computer database, as these items must be added to the computer before they can circulate. If the patrons chooses, he or she may wait in line again to have 3 more records added to the database.

* Due to the limitations of some library resources, access to certain kinds of materials and services must also be restricted.

  a) Patrons are permitted to check out a maximum of 6 juvenile books at a time. This is at the request of the Education Department and Children's Literature instructors. These materials are used to support the education programs of the university, and are subject to a high level of demand.

  b) Patrons are permitted to request a maximum of 3 'fast cats' per day. The procedure for retrieving and processing these materials is very labor-intensive. And the number of requests for these procedures are ever increasing. In order to insure a timely response to each request, individual patrons cannot make more than 3 requests per day.

  c) Faculty members are restricted to placing 5 new Faculty Book Delivery (FBD) requests per day. Faculty who would like to request more than 5 books at a time may submit a written list to FBD either in person or through campus or electronic mail to FBD. They should understand that we will search and deliver only 5 books per day.

* Additional and extraordinary restrictions may be imposed as circumstances require. The Circulation Department will seek to avoid such limitations, and will impose them only when the needs of the many outweigh the demands of individuals.

The second major task of the circulation desk employee is to negotiate with patrons who bring concerns and/or complaints to the department.

1. We strive to treat each patron with courtesy and understanding as we implement the library policies.

2. Exceptions to policies may be made on a case-by-case basis within established guidelines and according to the judgement of the desk supervisor. These exceptions are not due to the patron, they are a kindness we choose to extend to our patrons when we feel that such action is justified.

Within these parameters, remember that we seek also to implement the Christian virtues of compassion, mercy and forgiveness balanced with justice. Strive always to be fair in your execution of policy.

Appeals

Patrons who disagree with these policies may appeal them to the Circulation Department Chair.

We expect that patrons who have conflicts with the policies and/or procedures of the department will behave with common decency and decorum. Physical and/or verbal abuse is unacceptable under any circumstances. Individuals who act in an abusive manner will not be served and may be reported to University Standards.

MISSION AND GOALS OF THE ACCESS SERVICES DEPARTMENT

MISSION: The mission of the Access Services Department is to provide information resources and access services which properly support the university community in its instructional and research programs, and to extend these services, where practicable, to researchers and other individuals not affiliated with the University of Florida.

GOALS:

1. Develop a well-informed, interested and dedicated staff who are committed to providing excellent services to the public. Create and maintain a pleasant, positive environment for all library employees to work in.

2. Interact pleasantly and communicate effectively with all library users at public service desks and in other personal contacts at all times.

3. Establish and maintain effective personal links with appropriate library users (academic departments, faculty members and students) to insure the provision of services responsive to their needs as well as to gain continued understanding of and support for the Libraries.

4. Determine and establish the optimal schedule of operations in all locations and insure that qualified staff are available to provide service during those times.

5. Contribute in a significant way to the development and management of an excellent, dynamic collection of library resources which meets most needs of the research and instructional program on the local campus.

6. Provide prompt access to all forms of information resources needed by researchers but unavailable on the local campus.

7. Insure that excellent order is maintained in the collections and that prompt shelving is accomplished for rapid and easy access by library users at all times.

8. Promote the awareness and use of library services and resources through consistent and quality assistance, user orientation, training, handouts and other outreach programs.

9. Insure that library users can function with maximum independence in gaining access to the libraries' collections and services.

10. Maintain excellent control of all materials borrowed from the libraries and insure fair access to them for all users.

11. Provide excellent security for library materials from theft, mutilation and environmental damage.

12. Conduct all department operations and programs competently, efficiently and effectively, insuring proper use of staff and other resources, and adopting new methods, techniques and services when appropriate.

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MISSION STATEMENT: The mission of the Circulation Department is to maintain the library's book collection in King Library South; maintain accurate circulation records; offer services that will enhance the intellectual pursuits of the UK faculty, students and other researchers within and without the UK community; and maintain the safety and security of the patrons and the building.

GOALS:

I. The department will maintain the library's book collection in King Library South.

II. The department will maintain accurate check-out and check-in records.

III. The department will maintain accurate overdue fines and delinquency records.

IV. The department will provide a Reserve Room.

V. The department will provide a Search/Recall service.

VI. The department will provide a Claims Returned service.

VII. The department will assign special study areas for graduate students and faculty.

VIII. The department will strive to communicate and cooperate with the other units and departments within the library.

IX. The department will strive to maintain channels of communication within the department.

X. The department will honor the reciprocal borrowing agreements made with other colleges and universities in Kentucky and the Reciprocal Faculty Borrowing Program sponsored by the Online Computer Library Center.

XI. The department will strive to maintain the safety and security of the patrons and building.

XII. The department will be attentive to the preservation needs of the collection.

XIII. The department will maintain policies and procedures manuals.

XIV. The department will have an ongoing record of departmental activities.

XV. The department will provide patrons with answers to directional questions.

OBJECTIVES:

I. The department will maintain the library's book collection in King Library South by:

A. Having two staff members primarily responsible for the stack areas.
B. Training staff and students to shelve the books.
C. Shelving the books in accurate call number order.
D. Clearing the stacks and study areas of books used within the library.
D. "Reading" the shelves on a routine basis.
E. Shifting books in the collection when shelves are crowded.
F. Providing directional signs throughout the library.
G. Maintaining the New Book shelf in the lobby.
H. Inserting 3M tattletape security strips and/or resensitizing all books before they leave the department to be shelved.
I. Routing books to other library departments housed in King, branches, and non-UK libraries.

II. The department will maintain accurate check-out, check-in, and item and activity records by:

A. Training staff and student workers in the automated circulation system.
B. Checking in returned books twice.
C. Providing receipt check-in as an option for patrons.
D. Using the "shelf" function of the online system for books with internal library use.
E. Assigning barcodes to books with a system supplied ID number.
F. Creating mini bibliographic records for books not in the database during check-out.
G. Setting the status of books to SNAG, LOST, DAMAGED, CLAIMS RETURNED, PATRON LOST, FOUND, FIXED as appropriate.
H. Maintaining a back-up circulation system.

III. The department will maintain accurate overdue fines and delinquency records by:

A. Having a staff member responsible for overdues and delinquencies.
B. Notifying patrons by mail about overdue books and fines.
C. Modifying fines and fees when justified.
D. Adding fines and fees when justified.
E. Reporting STOPS (blocks) on students records through the Student Information System.

F. Reporting reciprocal college students who are delinquent borrowers at UK to their respective colleges.
G. Arranging payment schedules with UK students, faculty, and staff when appropriate.

IV. The department will provide a Reserve Room by:

A. Having two staff members responsible for maintaining the Reserve Room.
B. Soliciting faculty reserve lists.
C. Processing the reserve lists, retrieving the books, and making photocopies of articles.
D. Maintaining notebooks with current reserve items.
E. Maintaining accurate reserve check-out, check-in, and fine records.
F. Adding fines online as necessary to a patron's record.

V. The department will provide a Search/Recall service by:

A. Having a staff member responsible for Search/Recall.
B. Providing search forms for patrons who cannot locate books that are "available" in the online public access catalog and searching for these books.
C. Providing recall forms for patrons who want a book recalled from another patron and mailing recall notices.
D. Notifying patrons when search/recall books are available.
E. Adding fines online as necessary for recalled books returned late.
F. Publicizing the Search/Recall service.

VI. The department will provide a Claims Returned service by:

A. Having a staff member responsible for claims returned books.
B. Providing claims returned forms.
C. Searching for claims returned books.
D. Saving claims returned forms for five years.

VII. The department will assign special study areas for graduate students and faculty by:

A. Keeping accurate assignment records.
B. Keeping keys, key cards, and combinations to lockers.
C. Informing the patrons about the policies.
D. Periodically clearing the areas of books and personal possessions.

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VIII. The department will strive to communicate and cooperate with the other units and departments within the library by:

A. Keeping other departments/units informed about the location of books in the collection when shifts occur and changes in Circulation policies and procedures when they affect other departments/units.
B. Being conscious of departmental decisions that will affect other departments/units.

IX. The department will strive to maintain channels of communication within the department by:

A. Scheduling monthly staff meetings or more if needed.
B. Sharing information that affects the department as the need arises.
C. Using the message function of the online system and a log to communicate with the Student Night Supervisors.

X. The Department will honor the reciprocal borrowing agreements made with the other colleges and universities in Kentucky and the Reciprocal Faculty Borrowing Program sponsored by OCLC by:

A. Providing a borrower's card and check-out privileges to reciprocal patrons with proper identification.
B. Sending overdue/delinquency notices to patrons if appropriate.
C. Notifying the library at the home institution if a patron is delinquent with overdue books and/or fines.

XI. The department will strive to maintain the safety and security of the patrons and the building by:

A. Training staff and students how to respond to the following emergencies: fire, bomb threats, tornadoes, anti-social incidents, health emergencies, theft, maintenance problems, and water damage.
B. With the cooperation of UK's Fire and Accident Office, holding at least one fire drill each year.

XII. The department will be attentive to the preservation needs of the collection by:

A. Routing books in need of repair to the Bindery/Preservation Department.

B. Training staff and students in the care and handling of books.
C. Asking patrons not to use food, drink, or tobacco products in the library.
D. Setting up a shelf cleaning and book dusting schedule.

XIII. The department will maintain policies and procedures manuals for all staff positions and a general staff/student training manual and update and reevaluate as needed by:

A. Requiring that all staff write and/or update manuals as needed.
B. Requiring that the general staff/student manual be used to train new staff/students and made available for ready reference.

XIV. The department will have an ongoing record of departmental activities by:

A. Having each staff member in the department keep accurate statistics of their units activities on a monthly basis.
B. Having the department head use these statistics and other pertinent data in writing reports.

XV. The department will provide patrons with answers to directional questions by:

A. Having a current list of departmental phone numbers.
B. Being familiar with auxiliary departments located within the library.

STATEMENT OF OBJECTIVES FOR COMING YEAR

1. Expand the LIBROS system. Transfer all machine readable records presently stored on the LS/2 system.

2. Identify other libraries that may be interested in participating in the LIBROS system and negotiate their role as a participant in the system.

3. Build a new computer room.

4. Develop a plan for increasing the work space for Interlibrary Loan and Document Delivery Service operations.

5. Finish shifting the periodical collection and base the new layout on space planning for the lower level.

6. Expand the Document Delivery Service.

7. Develop a five year plan for the use of automation in the Library.

9. Work with the Spanish Colonial Research Center in developing their databases.

10. Establish procedures to inventory all titles listed in the LS/2 system.

11. Evaluate gateway computer links.

12. Assess Interlibrary Loan procedures.

WASHINGTON UNIVERSITY LIBRARIES

CIRCULATION SERVICES

Goals

1. To provide efficient means of circulating library materials to the members of the University community and others who qualify through approved programs.

2. To provide to students access to reserve materials.

3. To provide a mechanism for insuring the return of materials borrowed.

4. To establish and maintain accurate records of all transactions pertaining to circulation of library materials.

5. To provide an effective security system for the protection of the library's collection and other property.

6. To provide for the timely and accurate shelving of the collection.

7. To plan and assist with implementation of a cost effective circulation system within the context of an automated, integrated library system.

8. To recruit, develop, and retain a competent staff in accordance with library personnel policies.

9. To assist in the effective management of library resources.

10. To maintain good communication and constructive working relationships with other units within the library system, the University and the community.

11. To provide for participation in collection development and management.

12. To participate with other research libraries and other appropriate organizations to develop mutually advantageous exchanges of ideas and resources.

13. To assist with development of fund raising.

14. To participate in the furtherance of the library-wide planning process.

15. Bldg security

SHELVING UNIT GOALS AND OBJECTIVES

GOALS

To get books used within the Library reshelved in the stacks as soon as possible after each pick-up.

To get books reshelved in the stacks within twenty four hours or less of their return to the Library.

To keep aware of the condition of the stacks, and maintain shelf order and quality stack condition.

Establish realistic and uniform standards of performance for every shelving task, with emphasis on time management.

Develope ways to motivate employees through job enrichment and structure in the unit.

Provide more training and follow-up.

OBJECTIVES

To improve on each indivuals ability to organize and complete tasks with the goals of the unit in mind.

To improve staff morale and job satisfaction.

To provide a high level of service to Library Users.

In order to meet the units goals and objectives:

1. All procedures will be carefully looked at and updated as needed.

2. The supervisor will work closely with the shelvers to set up uniform standards of performance.

3. The supervisor will follow-up frequently to make sure all procedures are understood and followed carefully.

4. The supervisor will begin to identify those indiviuals with skills, that are not being used in order to use the staff more efficiently.

THE UNIVERSITY OF WESTERN ONTARIO

LENDING CODE FOR THE UNIVERSITY LIBRARY SYSTEM.

1. *GUIDELINES FOR FACILITATING MAXIMUM LIBRARY SERVICE TO USERS.*

In the academic community the right to seek and obtain information is paramount, and the individual's access to information should be unhampered by arbitrary regulations. Reasonable borrowing regulations, however, are essential in order to assure fair access to information by all library users.

Factors to be considered in the lending of library materials are: collective use of materials; reserve/heavy demand materials and regular loan materials; fair practice in extending borrowing privileges; the needs of initial borrowers and subsequent borrowers in the use of particular materials; the relationship between the length of the loan period and the availability of library materials; and the necessity of voluntarily returning library materials following use.

The guidelines for facilitating maximum library use are:

i) Library materials, which are the property of the University, are available for the ***collective*** use of the University community.

ii) The aim of the library staff is to encourage and stimulate the ***use*** of library materials and services.

iii) It is desirable for the Library to strike a ***balance*** between the length of the loan period and book availability. Materials in "heavy-demand" for course work (which are in General Collections) will be put in Reserve/Heavy Demand Collections to enable more frequent circulation.

iv) ***It is the nature of the library materials and their use, not the status of the borrower, that determines the length of the loan period.***

v) When a borrower has had access to particular library materials for a reasonable time, then the request from another user for the same materials will be given priority. This procedure is referred to as ***Recall.***

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vi) Library material should be returned by borrowers as soon as it is no longer needed so that it is ***available for use by others.***

vii) Facilitating and encouraging the return of library material is more effective than imposing a fine for the non-return of materials.

viii) Fines will be levied to encourage the return of library materials in ***heavy demand***, or which have been ***recalled.***

2. *USERS.*

2.1 UNIVERSITY COMMUNITY, WITH FULL BORROWING PRIVILEGES

Full borrowing privileges permit the borrowing of materials in Reserve/Heavy Demand Collections, the recall of materials on loan and the use of Interlibrary Loan Services.

Persons in the following groups carry identification cards which are compatible with the terminals used in the automated circulation system:

i) All UWO credit students, and all constituent faculty, staff and professors emeriti.

ii) All people employed by UWO, or employed on UWO property, or the property of its affiliated colleges.

iii) All people not located on campus but who enjoy an ongoing affiliation with the University through legitimate research, instructional or administrative activities.

2.2 UNIVERSITY COMMUNITY, WITH LIMITED BORROWING PRIVILEGES

Limited borrowing privileges do not permit the borrowing of materials in Reserve/Heavy Demand Collections, the recall of materials on loan, or the use of Interlibrary Loan Services.

Persons in the following groups carry identification cards issued, on their request, by the University unit with which they are directly associated:

i) All people on campus for periods of limited duration who are engaged in activities supported or organized by The University of Western Ontario (and its affiliated colleges).

ii) All alumni of the University (and its affiliated colleges).

2.3 NON-UNIVERSITY COMMUNITY

This group of users has limited borrowing privileges as defined above (2.2), and consists of:

i) Holders of an identification card issued by the Ontario University Libraries Cooperative System (Inter-University Borrowing Project), or by la Conference des recteurs et principaux des universites du Quebec.

ii) Students and faculty of other universites identified by a valid home university identification card.

iii) Guest borrowers, defined as non-members of the University community engaged in personal development programs of study, who require regular access to specialized collections for professional or job-related purposes on a short term basis.

To qualify, guest borrowers must complete an application form and present appropriate identification. Cards may be renewed upon personal application after the expiry date.

There is no fee levied.

Students enrolled in primary and secondary schools, and in post secondary education institutions, not specified in 2.3(i) above, are excluded from guest borrowing privileges.

3. PRIVACY OF LIBRARY RECORDS.

University libraries must be responsive to the needs of the university community, and meet the requirements of that community in its endeavours as a teaching and research institution concerned with the discovery, dissemination, and preservation of knowledge. The freedom of intellectual enquiry and the freedom to read materials representing many points of view are basic freedoms in the community, and no member of the community should be subject to any pressure as a result of what is read.

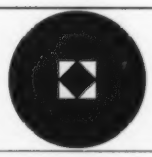
As an adjunct to the use of library materials a record of borrowing is made in order that control over the collections may be maintained by the library staff. This record is also the source of data for analyses of the use made of the collections and parts of the collections. These analyses are concerned with the materials which have been used and not with the individuals who make use of library materials.

Therefore, to protect the personal rights and privacy of users to consult and borrow library materials without prejudice, it is library policy that names of library users are not released to any person, institution, association, or agency for any reason.

SYSTEMS AND PROCEDURES EXCHANGE CENTER

SELECTED READINGS

ASSOCIATION OF RESEARCH LIBRARIES



OFFICE OF MANAGEMENT SERVICES

Selected Readings

Even though the term "access services" has been used for more than a decade, little has been written about this type of operation in any type of library. There is a wealth of articles, books, and research reports on functions often incorporated into access services (e.g., circulation, stacks maintenance, interlibrary loan, fee-based services, library security), but very little has appeared in library literature on the topic of overall management and organization of access services. In fact, "access services" is not yet a subject heading in ***Library Literature***, and one must either do a free-text search or peruse the items listed under "circulation" in order to find relevant materials.

The following list includes readings that discuss the evolution and history of circulation services as well as the few items that deal specifically with access services.

Intner, S. *Circulation Policy in Academic, Public and School Libraries.* New York: Greenwood Press, 1987.

Intner, S. "Circulation: The Third Service," *Technicalities* 9 no. 3 (1989): 9-11.

Paietta, A. C. *Access Services: A Handbook.* Jefferson, North Carolina: McFarland & Co., Inc., 1991.

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